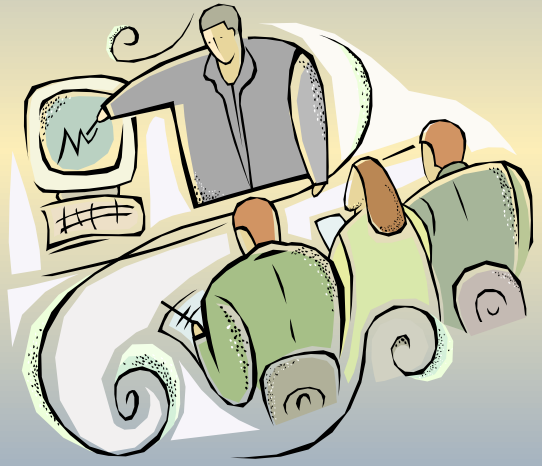
Electronic Document Access (EDA)

Contract Manual Upload



"Fly-in" Action

(Continue to Page Down/Click on each page…)

Manual Upload Capability

- Ability to *Upload* Base Contract Documents
- Ability to *Upload* Mods/Delivery Orders/Task Order Documents
- Ability to *Inactivate* and *Replace* Base Contract Documents
- Ability to *Inactivate* and *Replace* Mods/DO/TO Documents
- Ability to *Upload* a Mod/DO/TO without a Base Contract
- Upload capability isolated to individuals by Role & Issue DoDAAC(s). EDA POC grants Special Role to user.
- Conversion o
Adobe post sc

Manual Upload Business Rules & Mechanics…

Manual Upload Business Ru

- Only Authorized Users with the Upload Role w/valid "Issue" DoDAAC(s) can upload contract documents to EDA
- All uploaded documents are scanned for virus *(if infected, the document will not be accepted. EDA does not fix a virus)*
- Accepts PDF file formats
- Converts Microsoft word documents (.doc) and Adobe postscript files (.ps) to PDF *(all other file types are invalid for conversion)*
- The conversion process does not retain/store the original form/file type of the document
- Conversion of files occurs "near real-time" *(May need to wait)*
- Converted PDF is placed on the EDA document server

Upload Business Rules - Cont.

- Special Upload/Inactivate role is granted via organizations EDA POC
- EDA POCs must have Upload/Inactivate role to delegate role to lower levels of an organization
- Document inactivation activity triggers e-mail notifications to:
  - DFAS *(based on Pay DoDAAC)*
  - All Contract Load Notification List members, *if lists exists* prior to “Inactivation event”
- Document Upload and Replacement activity triggers the Daily EDA Load Reports
  - All Contract Load Notification List members, *if lists exists* prior to “Uplo
  will be notified by e-

To Obtain the Upload/Inactivate Role…

To Obtain Upload/Inactivate

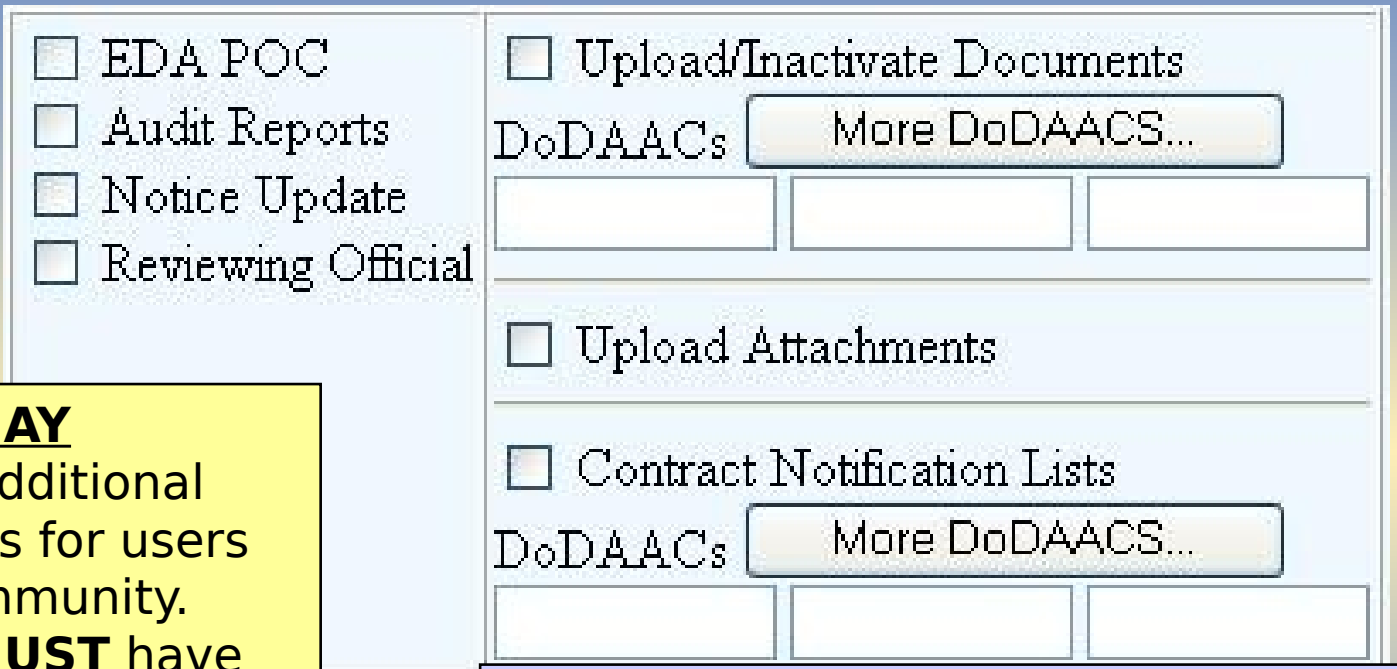
Request Contract Upload/Inactivate/Replace Role by contacting your EDA POC. Supply "Issue" DoDAAC(s)
(EDA POC will verify need of special role)

Note: To delegate/apply the Upload/Inactivate role to users in lower organizational levels within the C/S/A, the authority level accounts *(EDA POC/Executives)* require the Upload/Inactivate role on their own user accounts. Must have role to 'delegate' role.

EDA POC validates request and logs into EDA and performs maintenance on an account. *('checks' Upload/Inactivate Role, enters Issue DoDAAC(s) and processes/confirms updates).*

EDA POC Grants Special Role to User…

EDA POC 'toggles' on Role



EDA POCs **MAY** authorize additional special roles for users in their community.

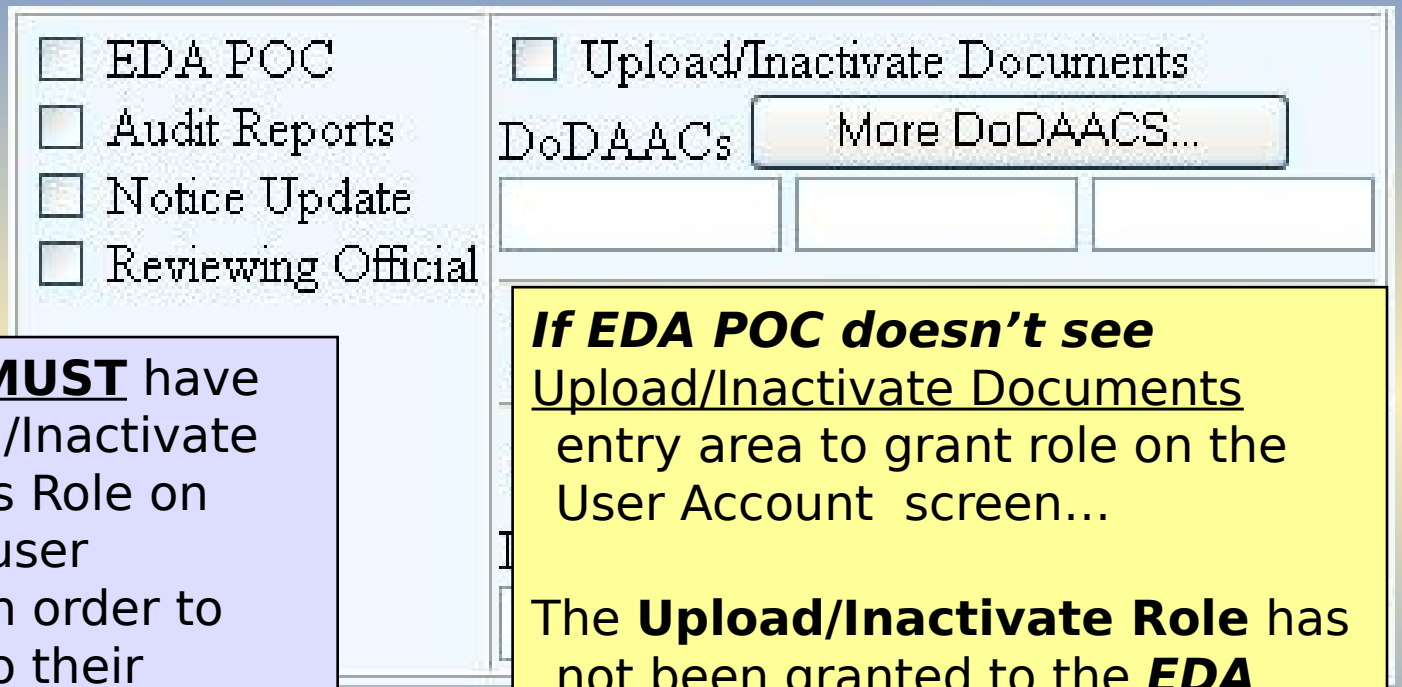
EDA POCs **MUST** have the Upload/Inactivate Documents Role on their *own* user accounts in order to *delegate* to their community.

EDA POCs obtain the role by requesting it

To activate special roles, Check the corresponding checkboxes.

Definition: *Need-to-Know* – The principle by which users are only granted access to the information, assets, and resources necessary to perform their assigned job functions.

EDA POC 'toggles' on Role



EDA POCs **MUST** have the Upload/Inactivate Documents Role on their *own* user accounts in order to *delegate* to their community.

EDA POCs obtain the role by requesting it from their C/S/A Executives.

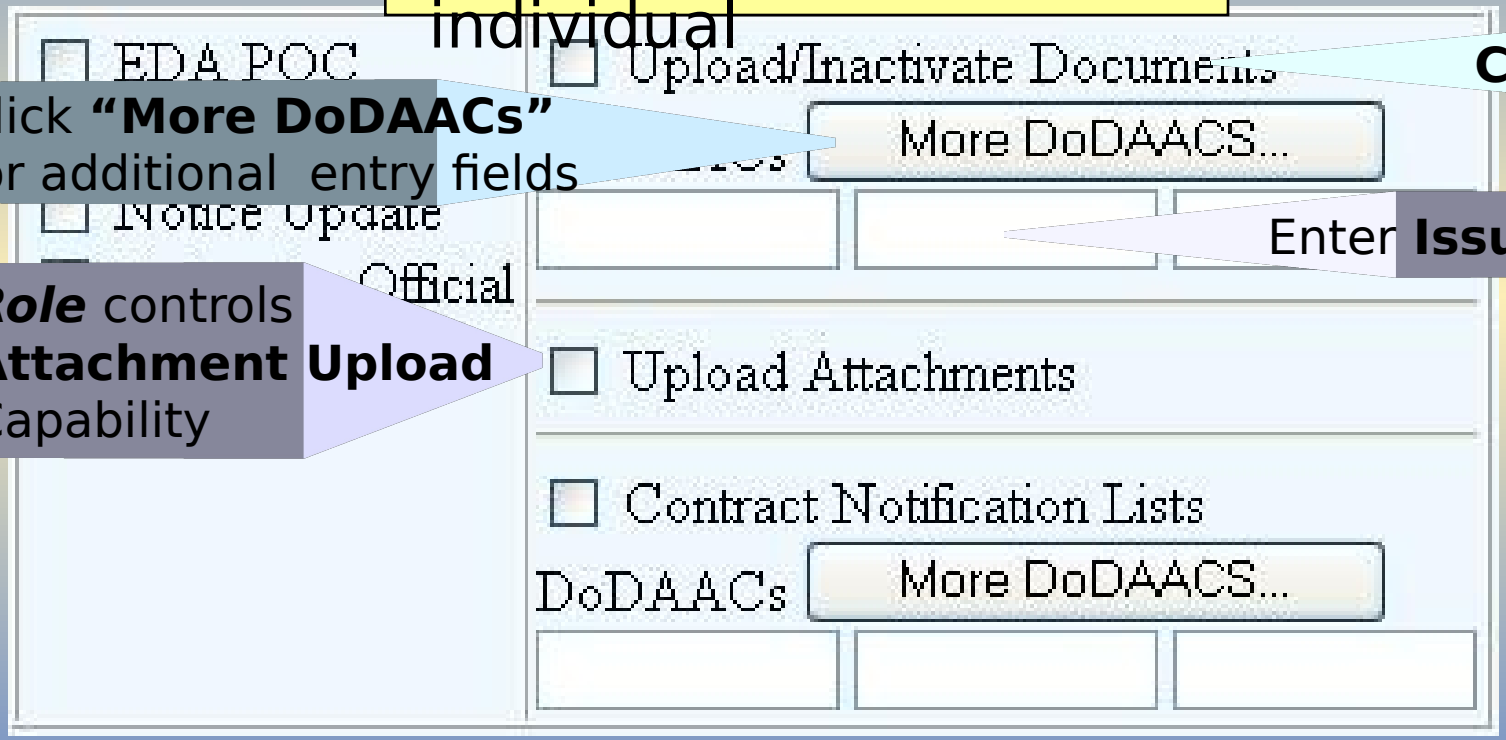
If EDA POC doesn't see Upload/Inactivate Documents entry area to grant role on the User Account screen…

The **Upload/Inactivate Role** has not been granted to the ***EDA POC*** user account

Contact the Executive for assistance in granting the role.

DoDAACs Required for Role

EDA POC may check roles required for individual



Check "Role"

Click **"More DoDAACs"** for additional entry fields

Enter **Issue DoDAAC(s**

Role controls **Attachment Upload** Capability

User's functionality is restricted to specific **Issue** DoDAACs.

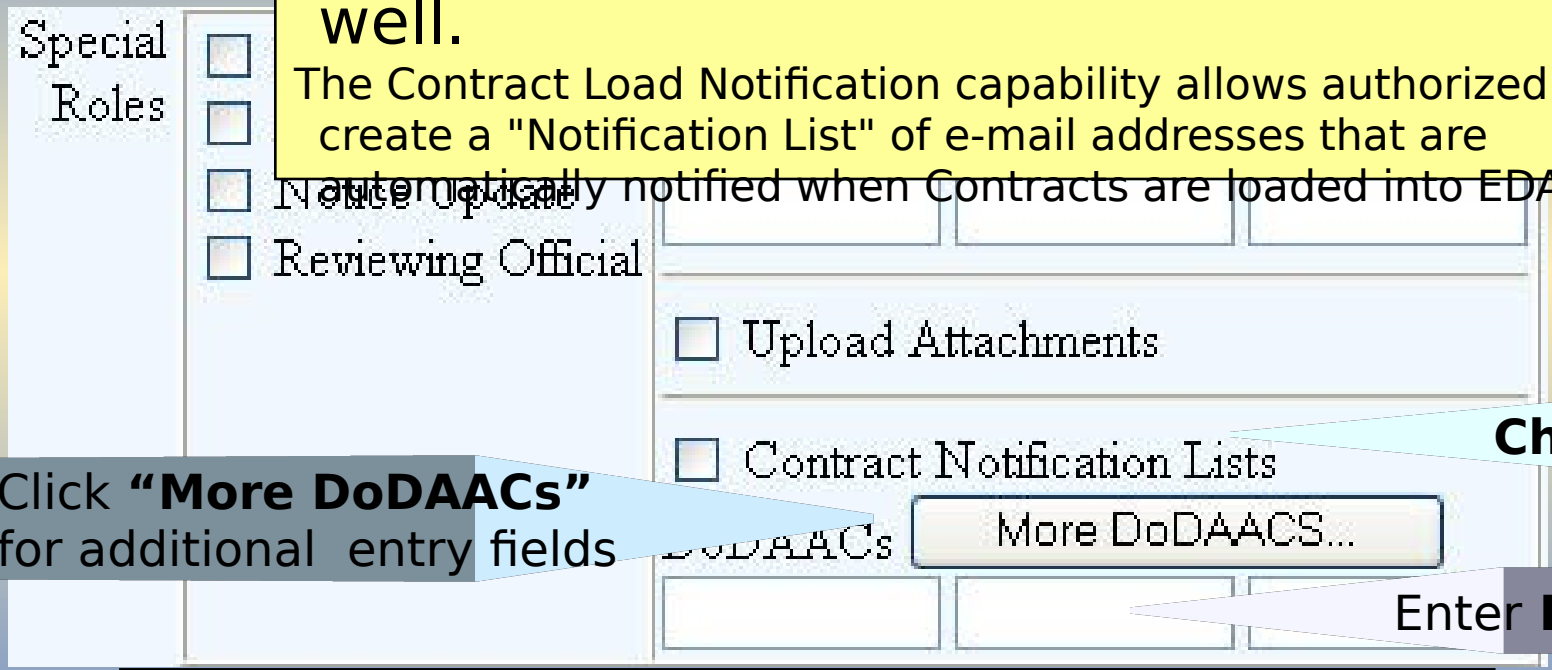
Consider Contract Notification List Role…

Consider Contract Notification

If Granting Upload/Inactivate Role…

Consider granting Contract Notification list as well.

The Contract Load Notification capability allows authorized users to create a "Notification List" of e-mail addresses that are automatically notified when Contracts are loaded into EDA.



Contract Load Notification functionality is restricted to specific ***Issue*** and/or ***Admin DoD***

Review Training Module on Contract Load Notification…

After Upload Role Granted

To Upload a Base Contract, a Contract Modification, a Contract Delivery Order or Task Order

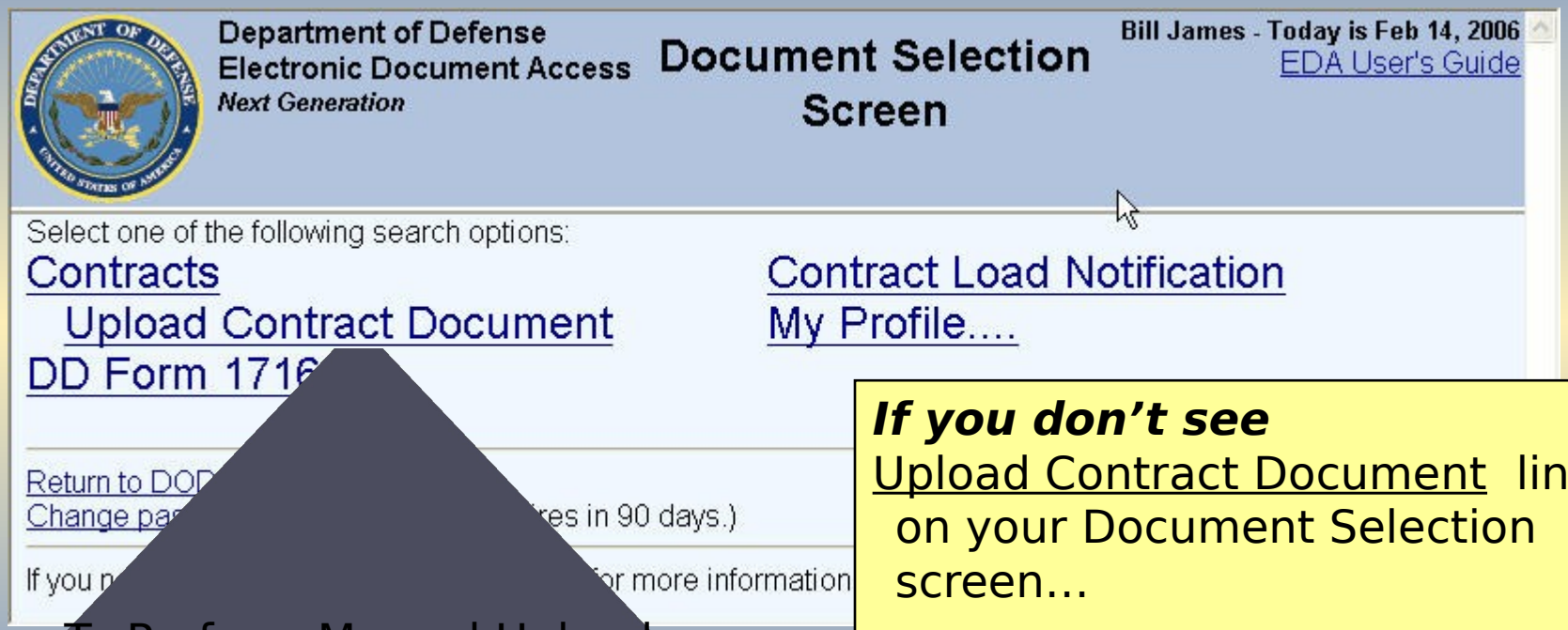
- Log into EDA
  - (http://eda.ogden.disa.mil) or
  - (http://eda.cols.disa.mil)

Note – EDA Server's replicate data constantly, therefore, stay at one site during upload activity.

- Two methods are available to upload

To Begin the Upload Process…

To Upload a Contract



To Perform Manual Upload

CLICK
"Upload Contract Document"
on the Document Selection

If you don't see
Upload Contract Document link on your Document Selection screen…

The **Upload/Inactivate Role** has not been granted to your EDA user account

Contact your EDA POC for assistance in granting the role.

New Contract or Already Loaded?

EDA offers two mechanisms to perform the Manual Contract Upload function

1) If New Contract Document to EDA…

- Click *Upload Contract Document* Link on the Document Selection Screen

2) If Contract Document Already Loaded in EDA…

- Click *Contracts* Link on the Document Selection Screen
- Query Contracts using any Contract Search Option
- Query Result page is presented with additional

Difference in the Two Option

Based on the ***existence*** or ***non-existence*** of a Contract Index within EDA, the interface offers the upload user additional options and assists in field pre-population *(if applicable).*

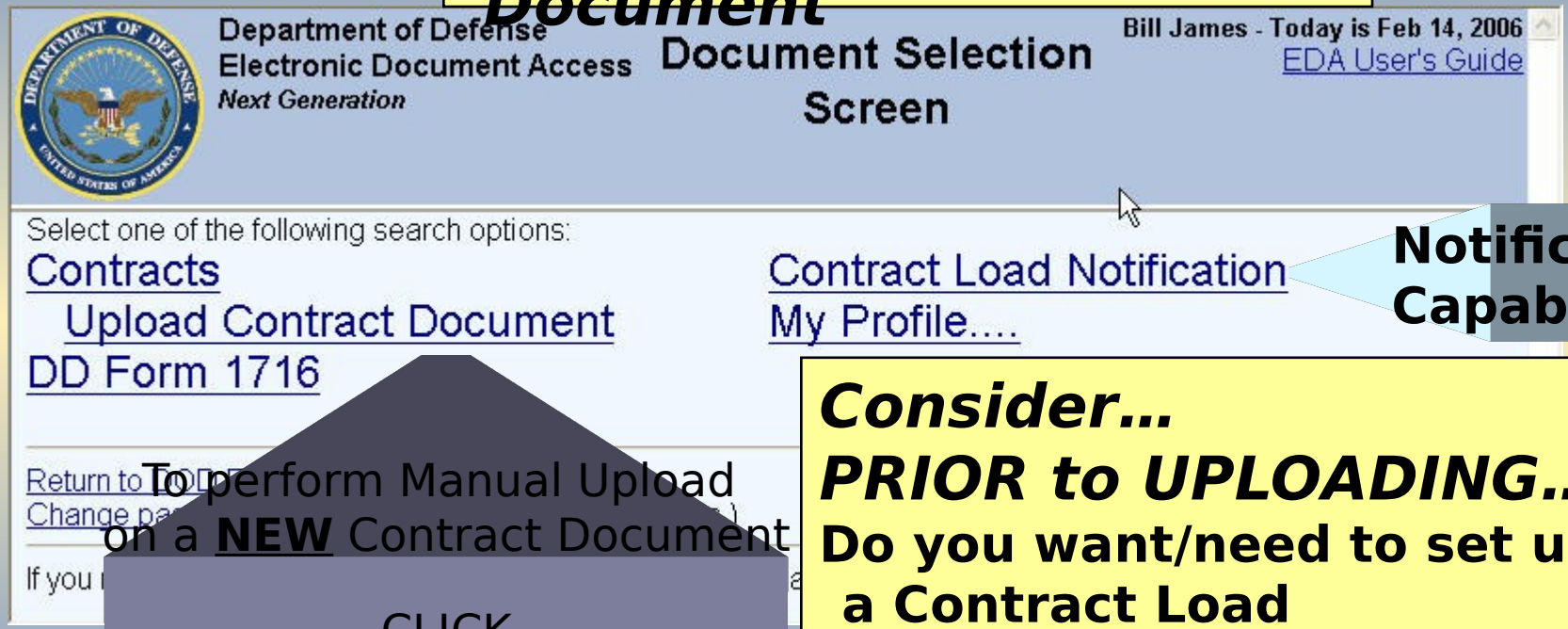
If the "Base" Contract Index Already Exists in EDA…

The Query Result page is presented with additional interface options

- Upload a Mod/DO/TO to an existing contract
- Inactivate an Existing Document (Base, Mod, DO or TO)
- Replace a Document (Base, Mod, DO or TO) *(Document Replacement is only allowed to be*

Upload a New Contract to EDA

For a ***New* Contract Document**



Consider…
PRIOR to UPLOADING…

Do you want/need to set up a Contract Load Notification List?

List must exist ***prior*** to "Load

Refer to the Contract Load Notification Training Module…

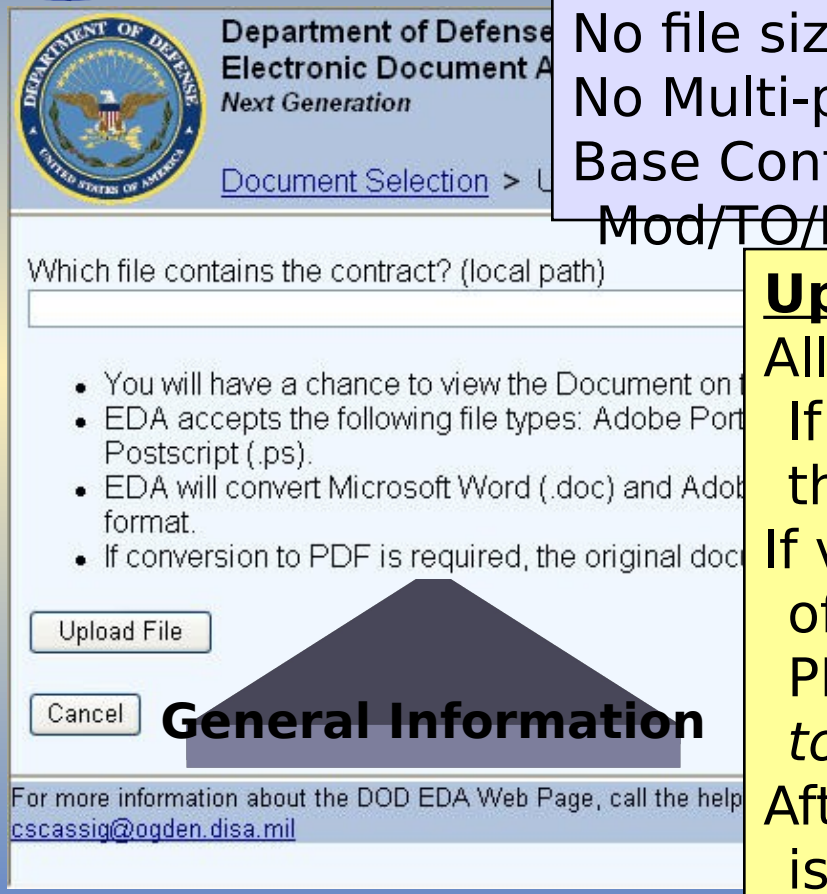
Begin the Upload Process…

Technical Details

No file size limitation, No timeouts

No Multi-part documents upload

Base Contract not required to upload Mod/TO/DO



Upload process:

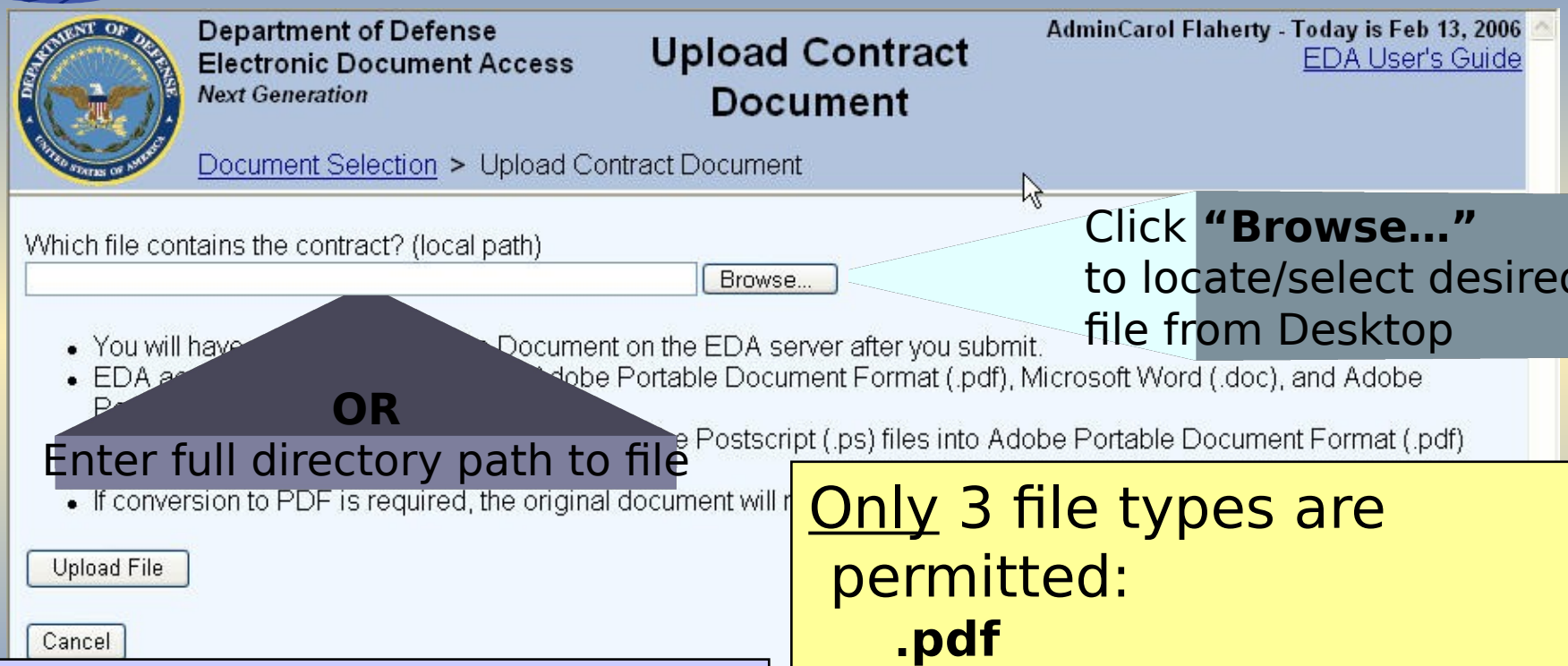
All documents are scanned for virus. If infected, EDA errors and rejects the document.

If virus-free, the document types of .doc and .ps. are converted to PDF (“near” real-time). *(May need to wait for conversion)*

After successful conversion, the .pdf is stored on EDA’s Document server.

Locate desired document for upload…

Mechanics of Upload



Click **"Browse…"** to locate/select desired file from Desktop

OR

Enter full directory path to file

Note: The conversion process does not store/retain the original form of the document. Conversion is accomplished in "near real-time".

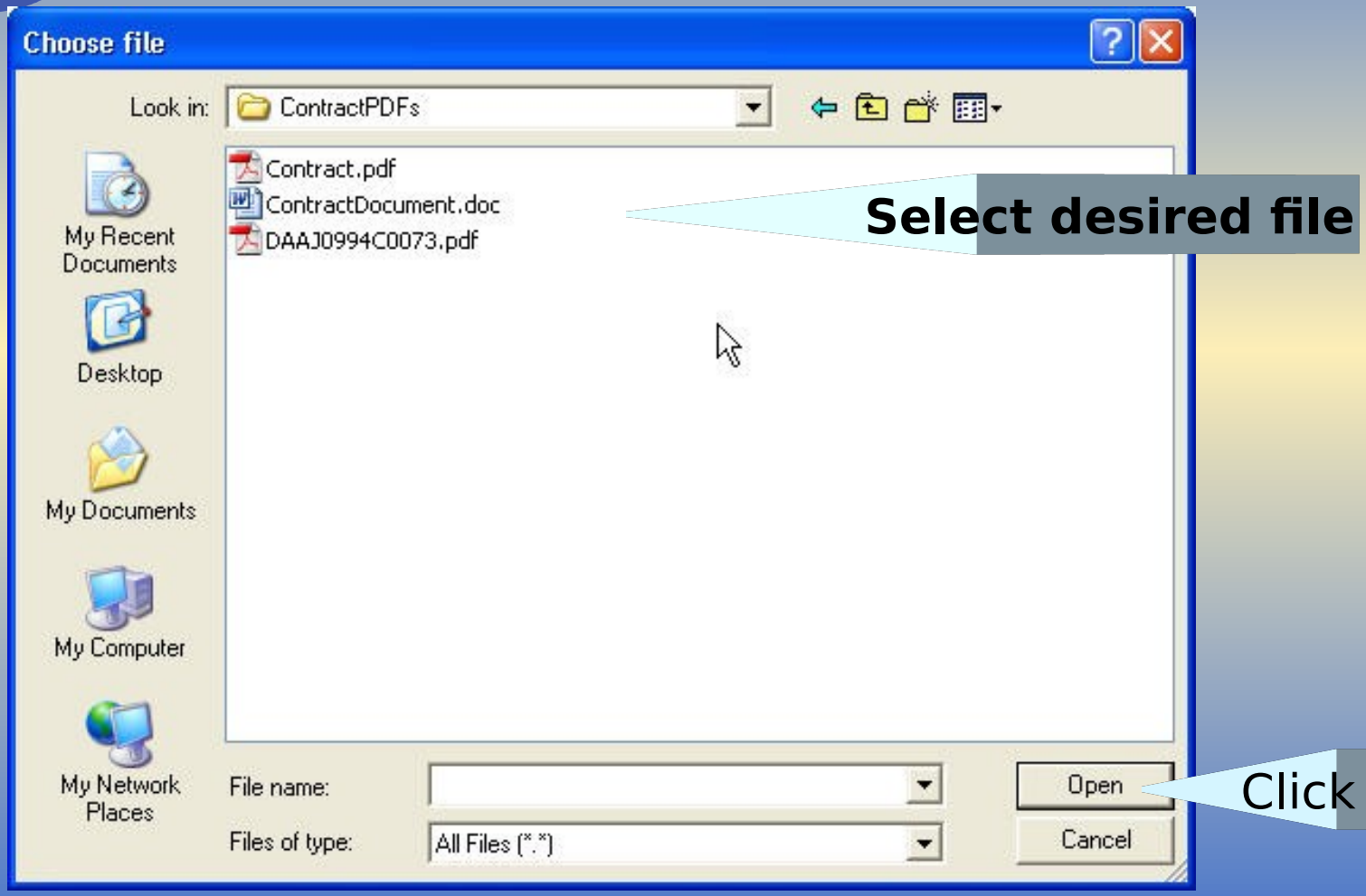
<u>Only</u> 3 file types are permitted:

- **.pdf**
- **.doc (Microsoft Word)**
- **.ps (Adobe postscript)**

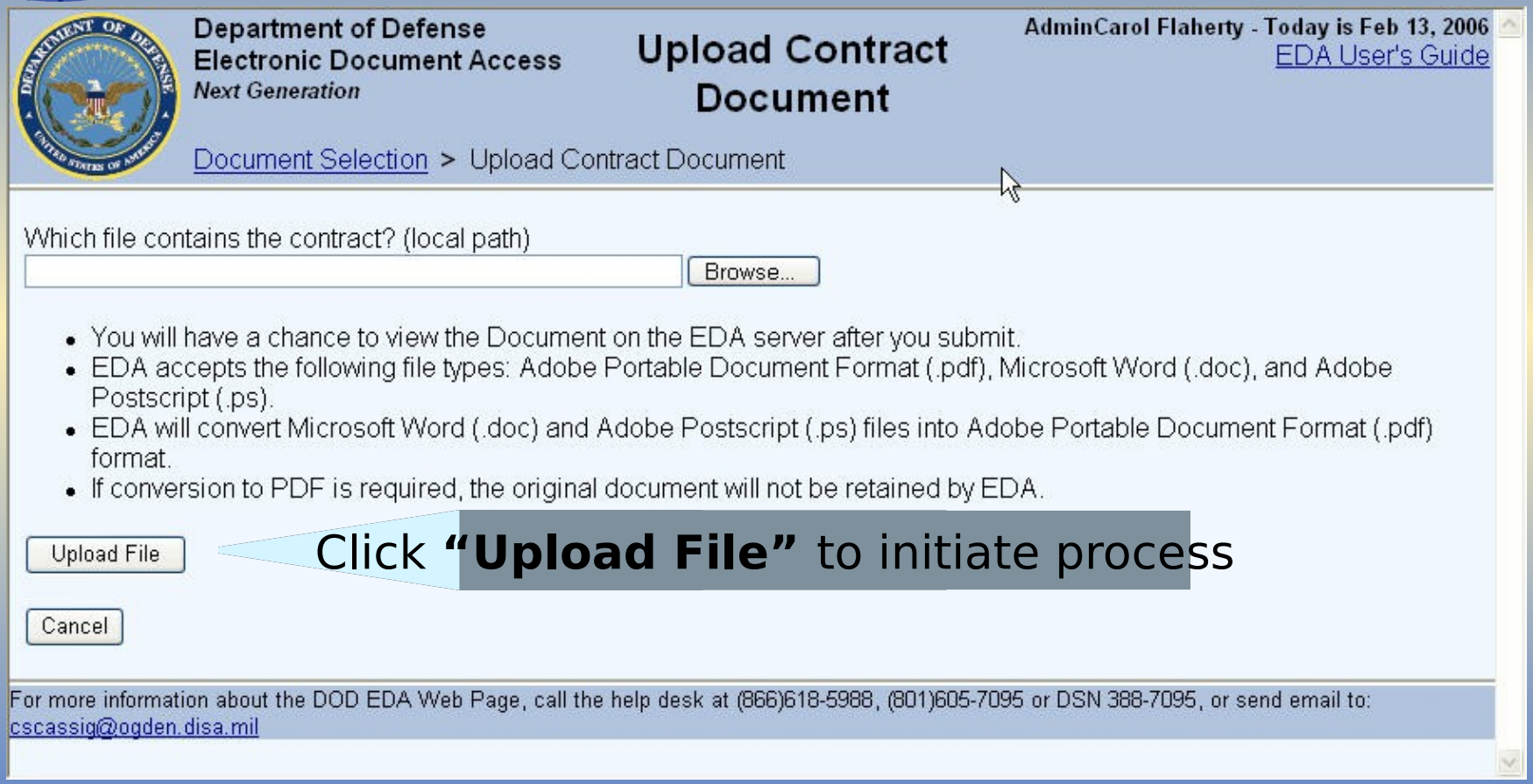
EDA will convert .doc & .ps to .pdf

EDA presents an error message

Browse/Select file to be uploaded

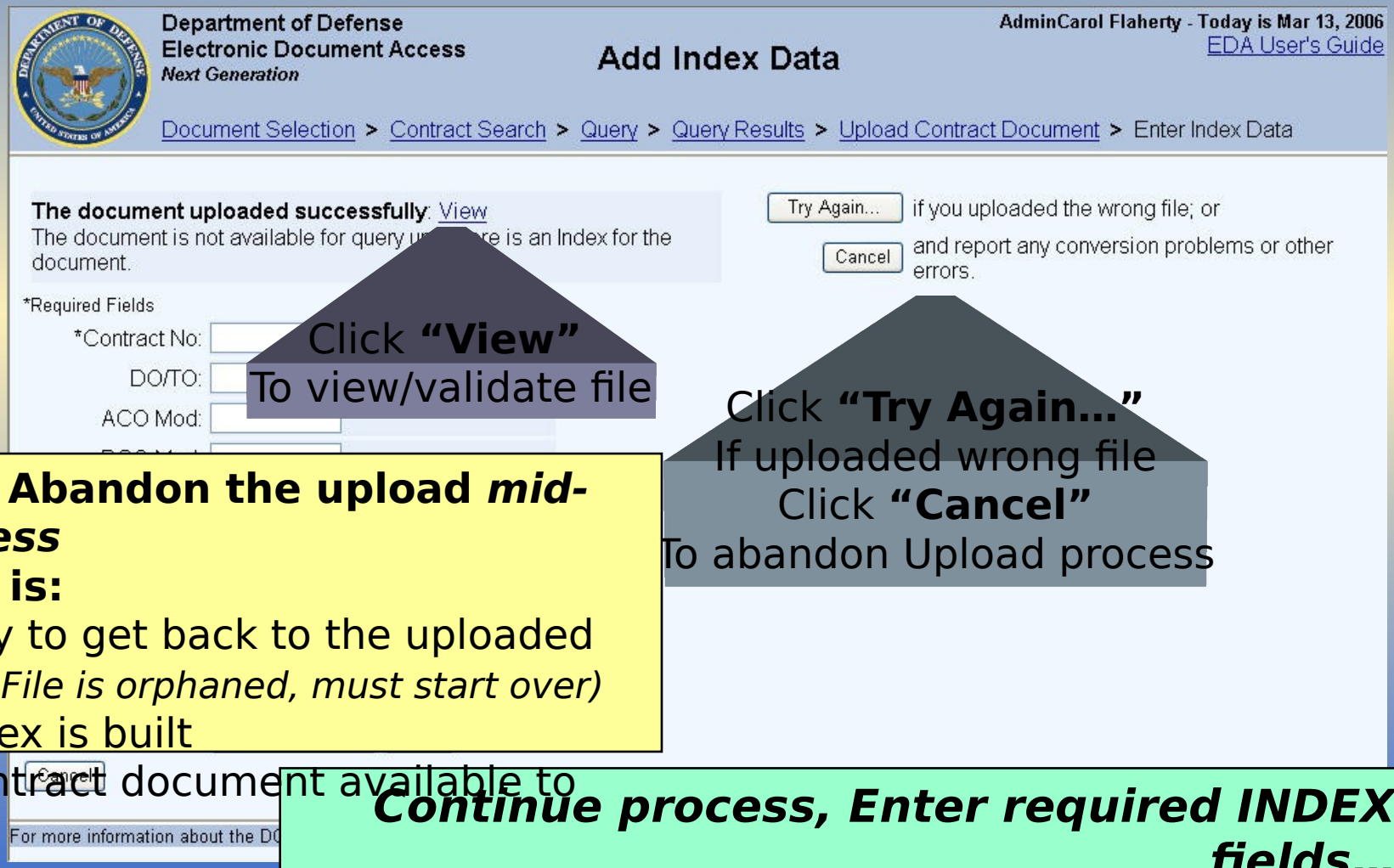


Upload file to EDA



Click **“Upload File”** to initiate process

Preview Document



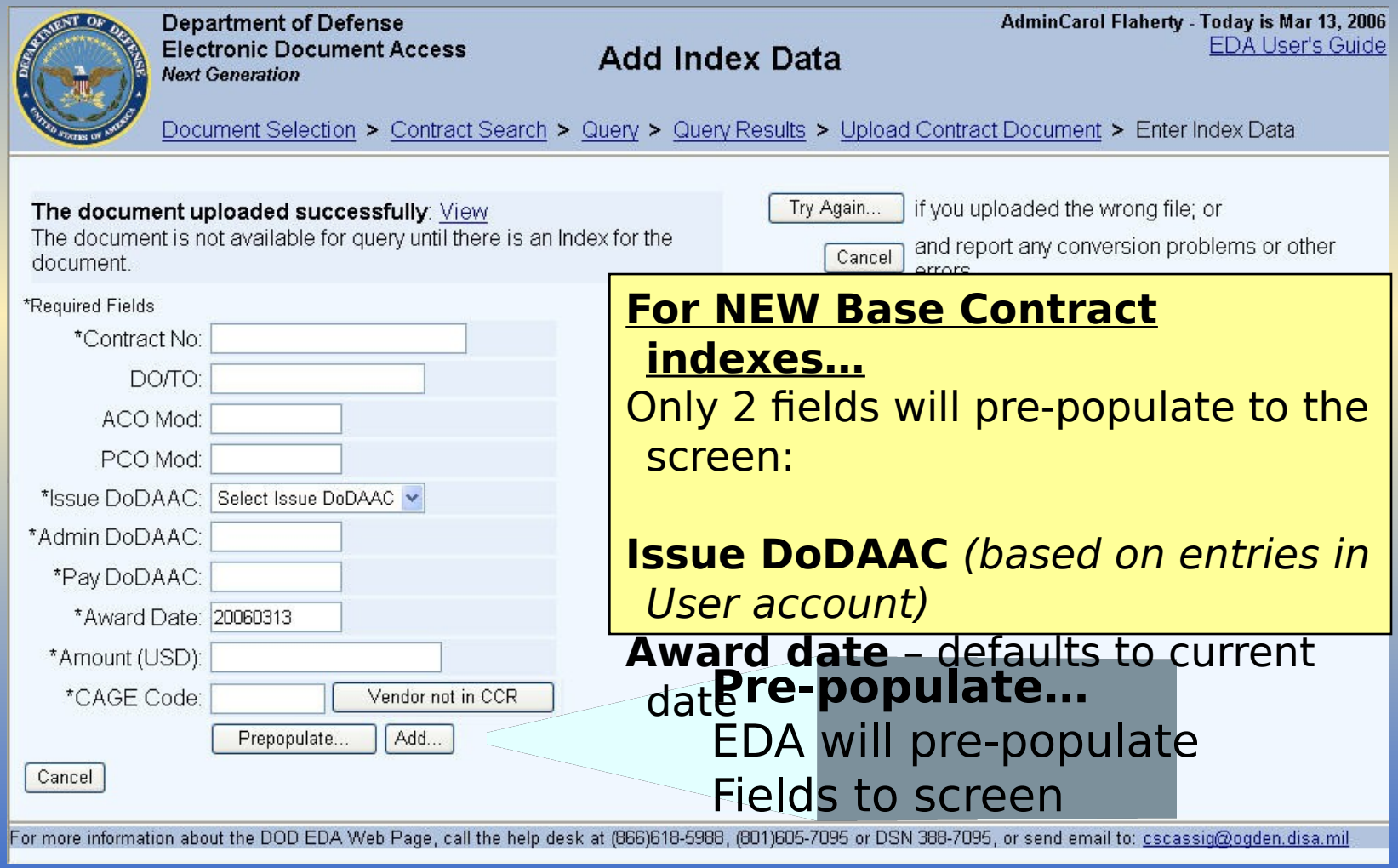
Click **"View"**
To view/validate file

Click **"Try Again..."**
If uploaded wrong file
Click **"Cancel"**
To abandon Upload process

If you Abandon the upload *mid-process*
There is:
No way to get back to the uploaded file. (*File is orphaned, must start over)*
No Index is built
No Contract document available to users

Continue process, Enter required INDEX fields…

Build Contract Index



For NEW Base Contract indexes…

Only 2 fields will pre-populate to the screen:

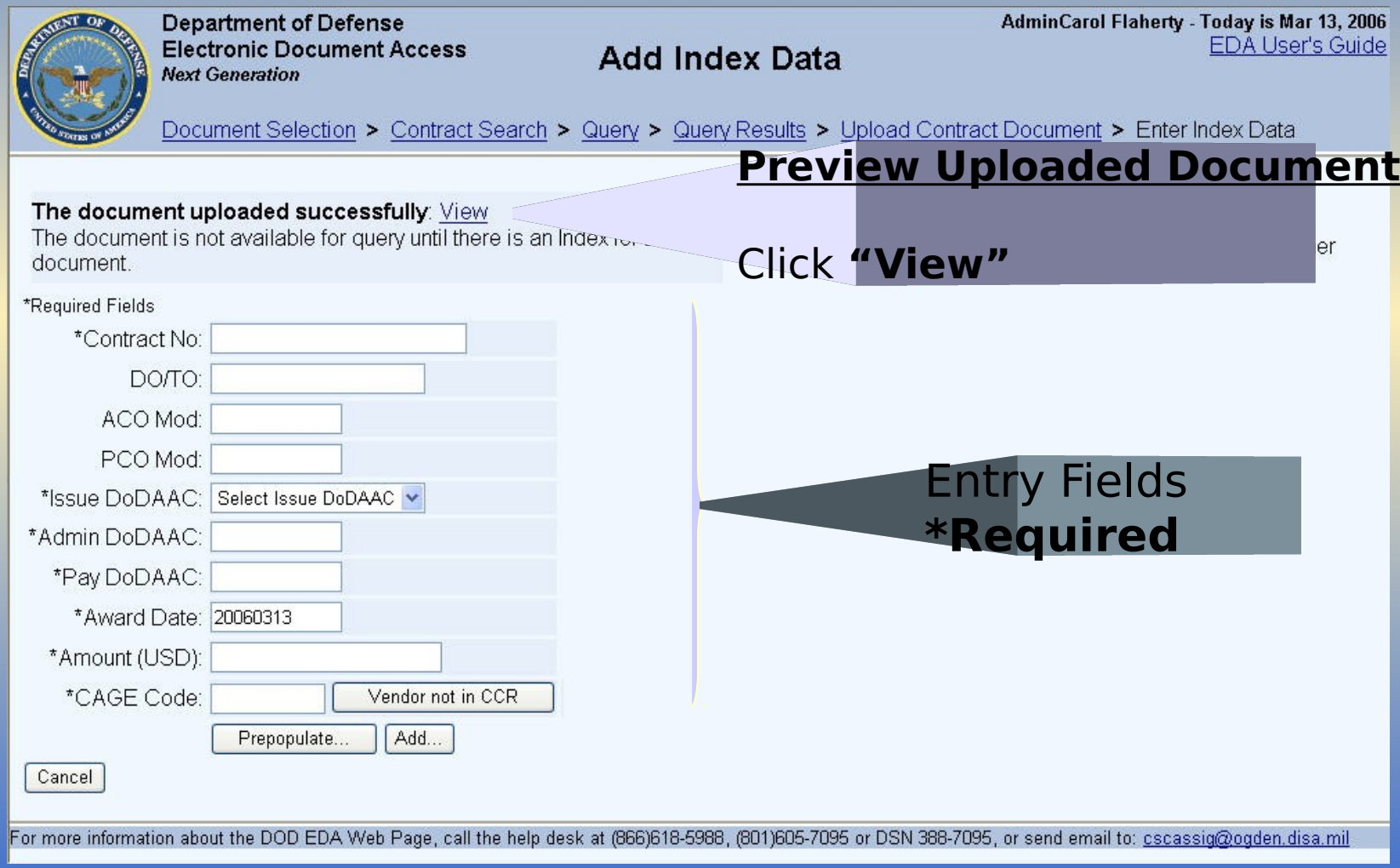
Issue DoDAAC *(based on entries in User account)*

Award date – defaults to current date

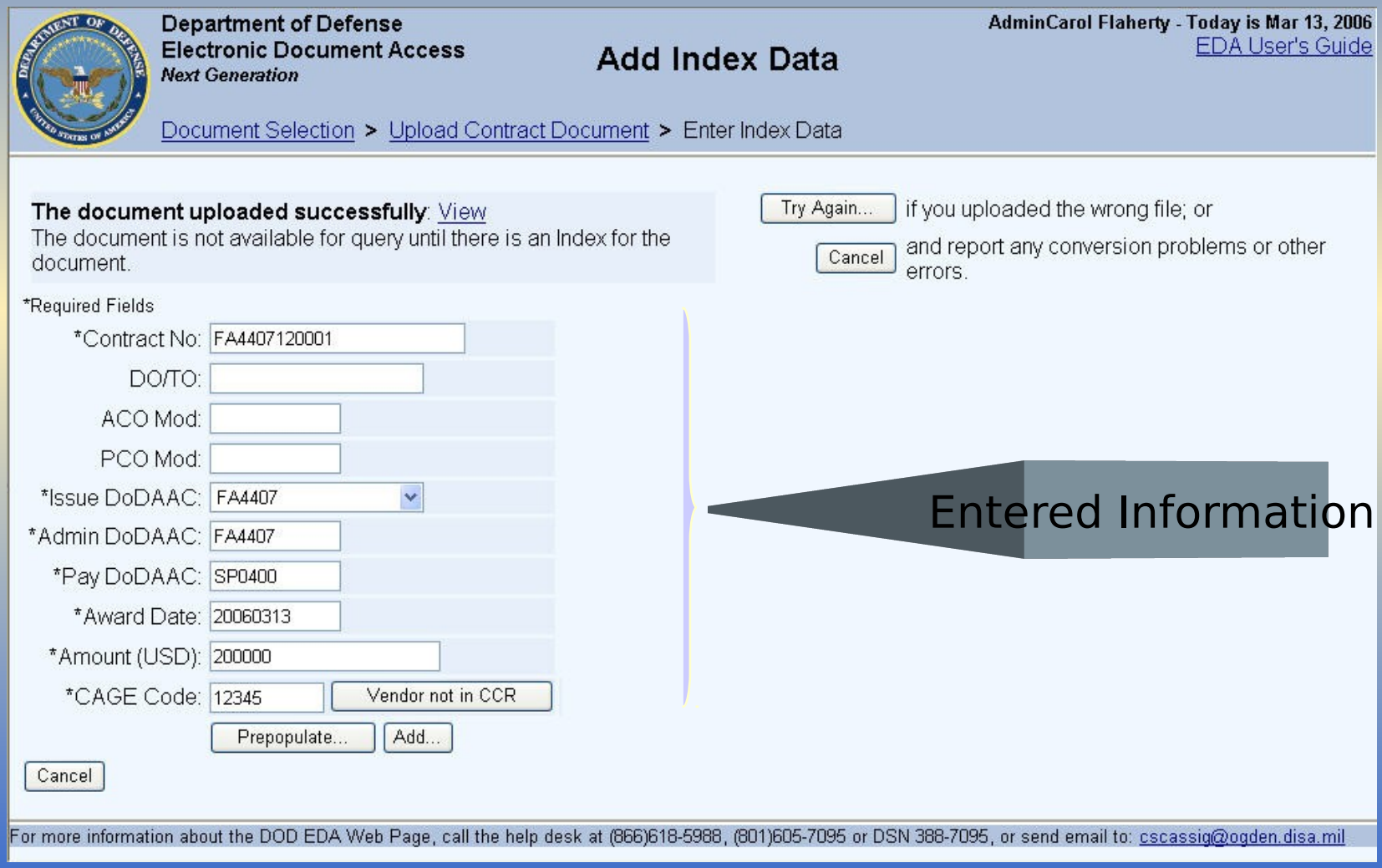
Pre-populate…

EDA will pre-populate Fields to screen

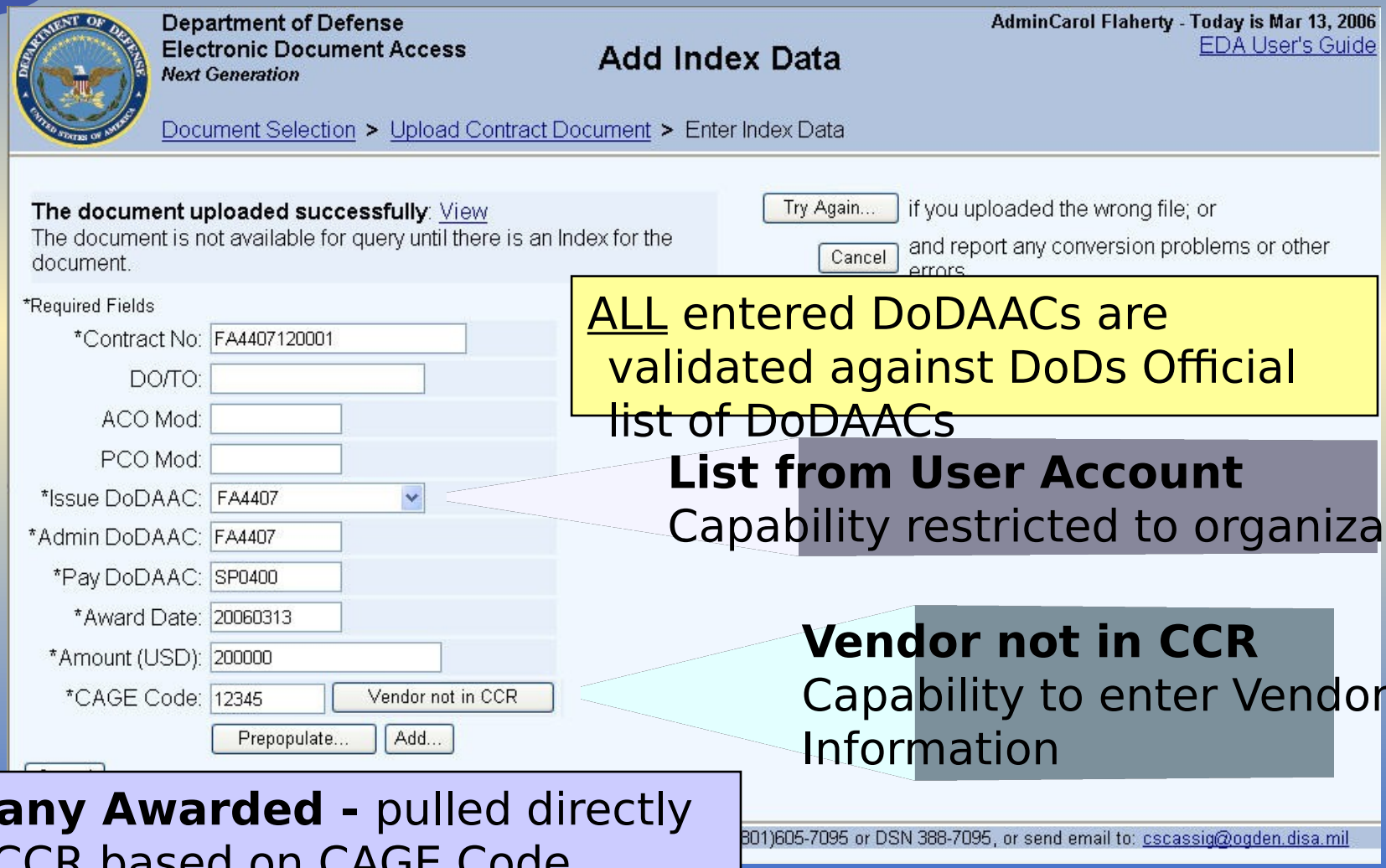
Build Index – Enter Fields



Contract Index Information



Build Index - Validation



ALL entered DoDAACs are validated against DoDs Official list of DoDAACs

List from User Account
Capability restricted to organizatio

Vendor not in CCR
Capability to enter Vendor Information

Company Awarded - pulled directly from CCR based on CAGE Code entered.

Vendor Information Entry

Illustrating the **Vendor Not in CCR** entry area

Department of Defense
Electronic Document Ac
Next Generation

> Document Selection > Contract Upload — My Settings

View
The document is not available until there is an Index for the document.

Try Again... if you uploaded the wrong file(s); or

Cancel and report any conversion problems or other errors.

*Required Fields

*Contract No:
DO/TO:
ACO Mod:
PCO Mod:
*Issue DoDAAC:
*Admin DoDAAC:
*Pay DoDAAC:
*Award Date: 20050609 click for calendar
*Amount (USD):

Switch to CAGE Code

Switch back to use **CAGE Code**

*Vendor Name:
*Vendor Address:
*Vendor Country: Select Vendor Country

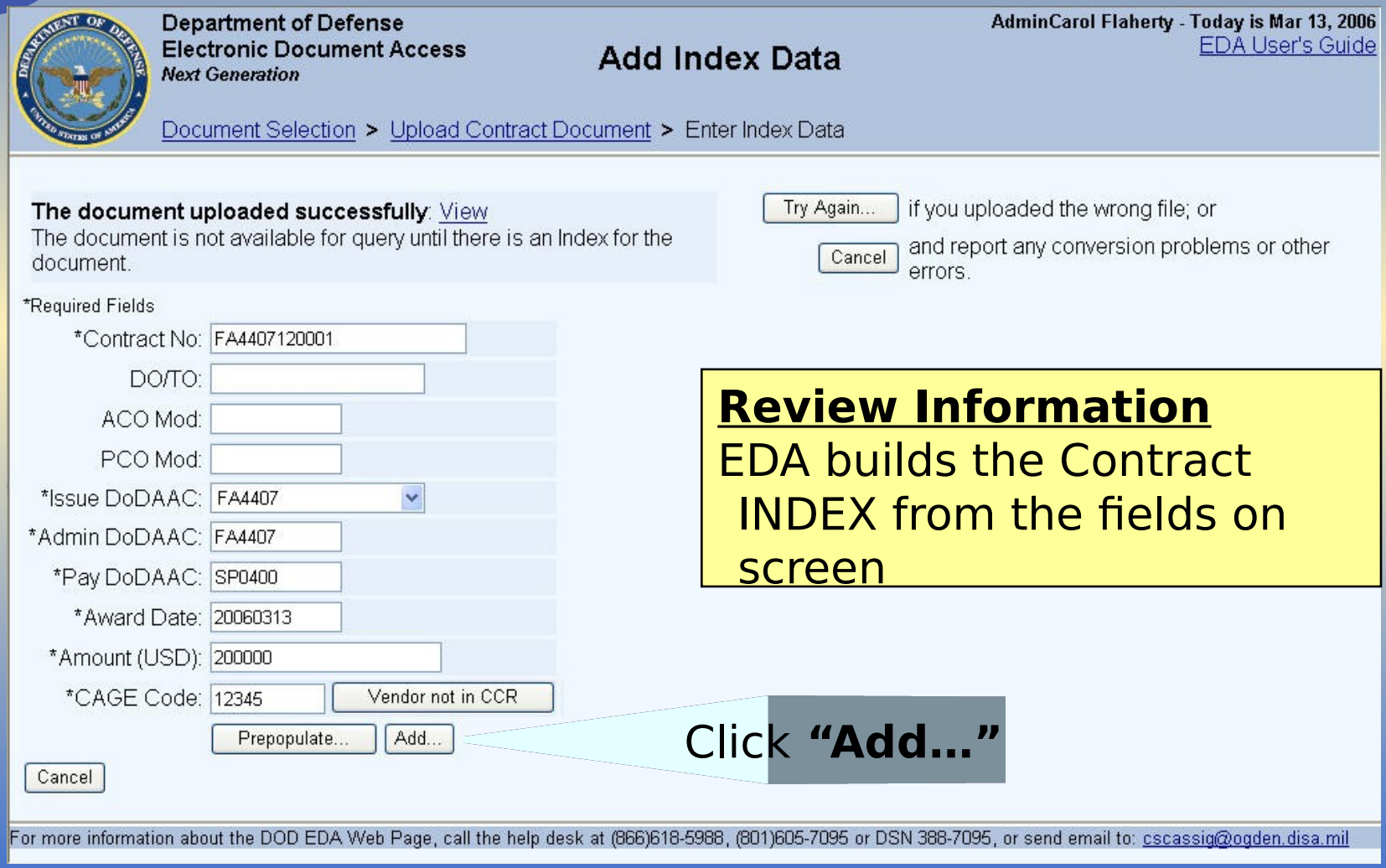
Prepopulate... Add...

Cancel

If you need assistance with EDA, click here for more information.

Enter *(*Required)*
***Vendor Name**
***Vendor Address**
***Country**

Add Contract Index w/Document

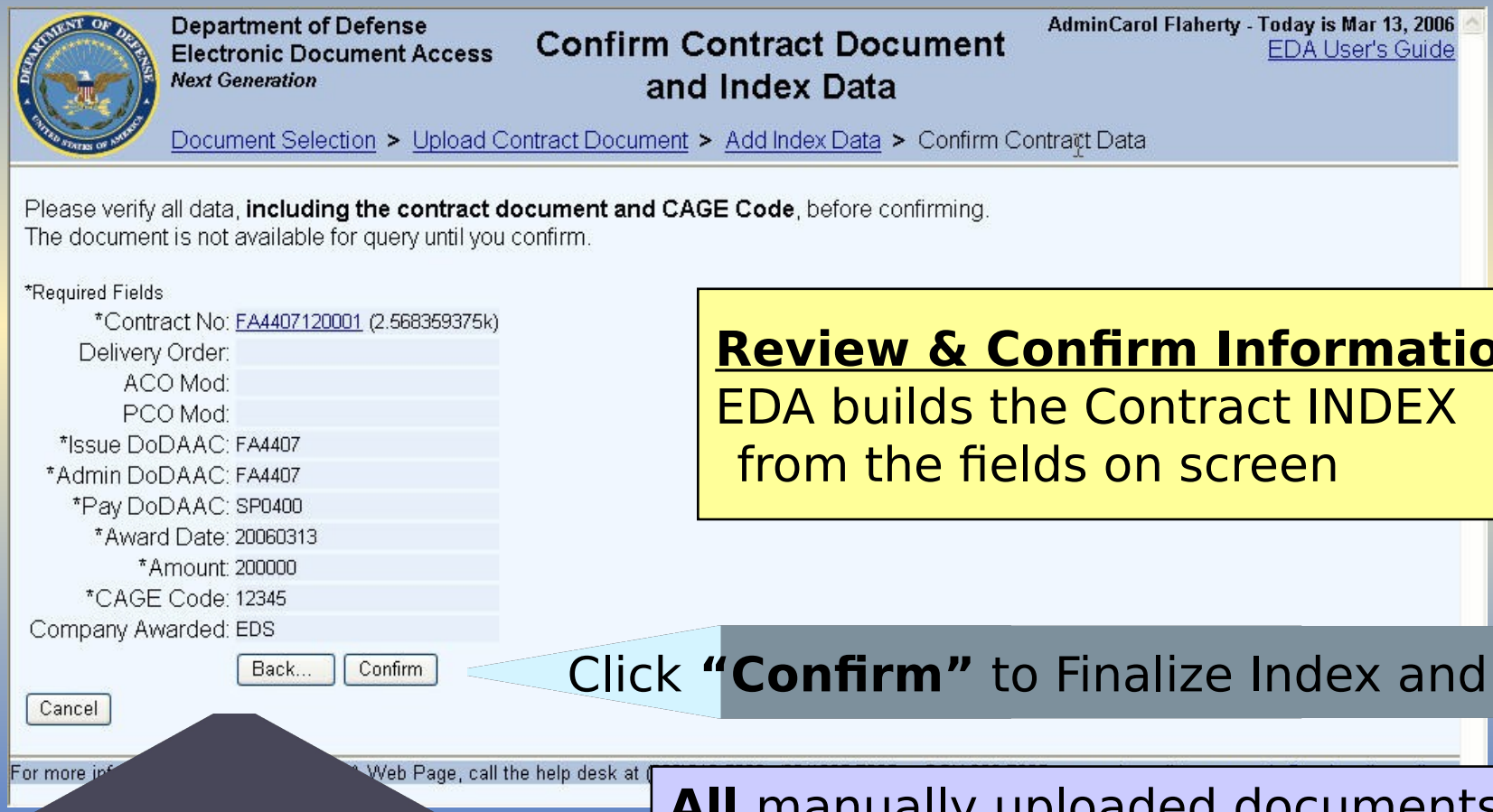


Review Information

EDA builds the Contract INDEX from the fields on screen

Click **"Add..."**

Upload Confirmation



Review & Confirm Information
EDA builds the Contract INDEX from the fields on screen

Click **"Confirm"** to Finalize Index and Uplo

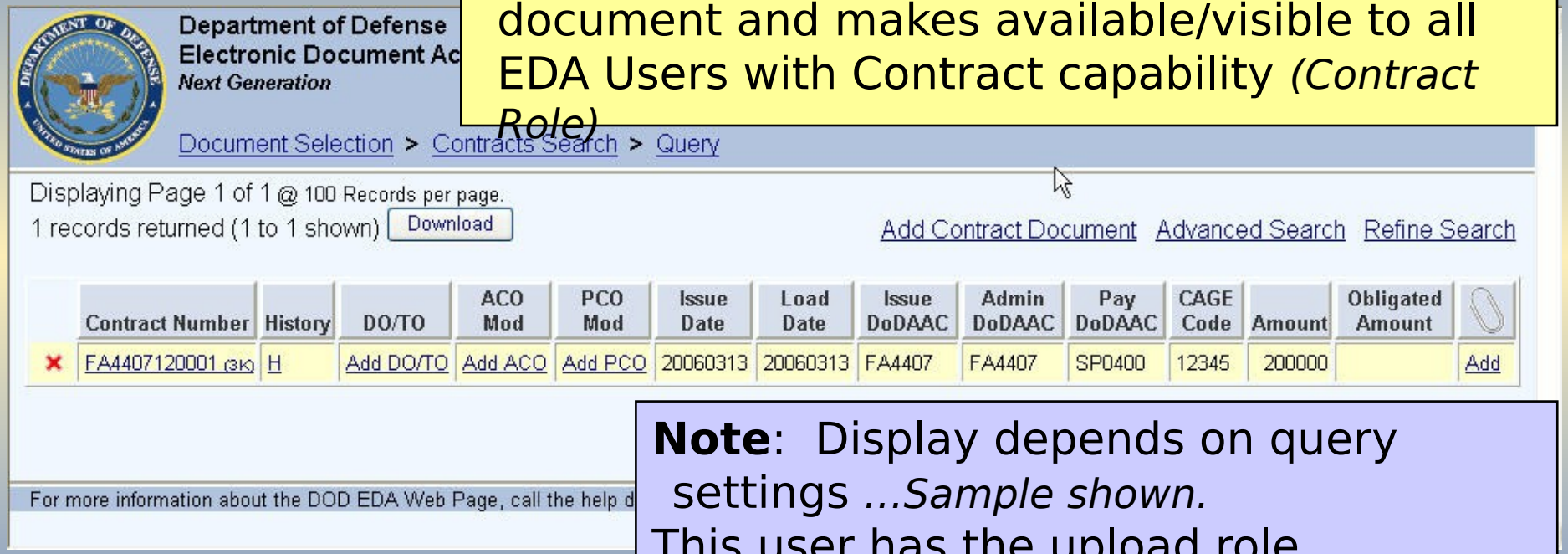
Click **"Back..."** to update/fix any information

All manually uploaded documents are included in EDA's 'Load' broadcast reports based on Load

After Confirm…Result Page

Contact Query Result Page

EDA builds the Contract index, stores the .PDF document and makes available/visible to all EDA Users with Contract capability *(Contract Role)*



Note: Display depends on query settings *…Sample shown.*

This user has the upload role.

EDA Highlights current upload activity.

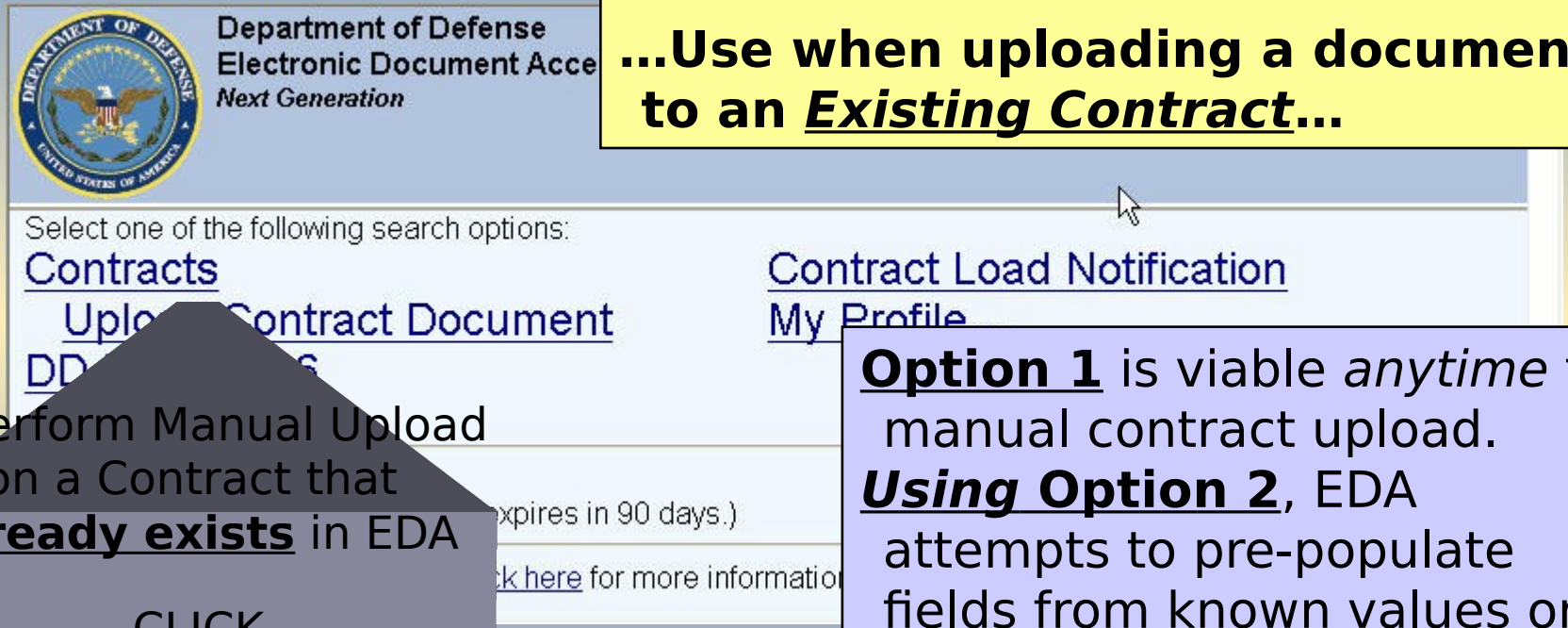
Additional interface options are presented

The Second Upload Option provides interface options on the screen …as shown above

Upload to an Existing Contract

Second Option…

…Use when uploading a document to an *Existing Contract*…



To perform Manual Upload on a Contract that **already exists** in EDA

CLICK **"Contracts"** on the Document Selection

Option 1 is viable *anytime* for manual contract upload.

***Using* Option 2**, EDA attempts to pre-populate fields from known values on the existing index.

You can use either method.

Search for a Contract…

Use any Contract Search Option

Contract Search Options

Use any Contract query option to locate desired contract

Supply *criteria* for option selected

Click **"View"** for results of query

Search Options are categorized by

Specific Contract

Date Ranges &

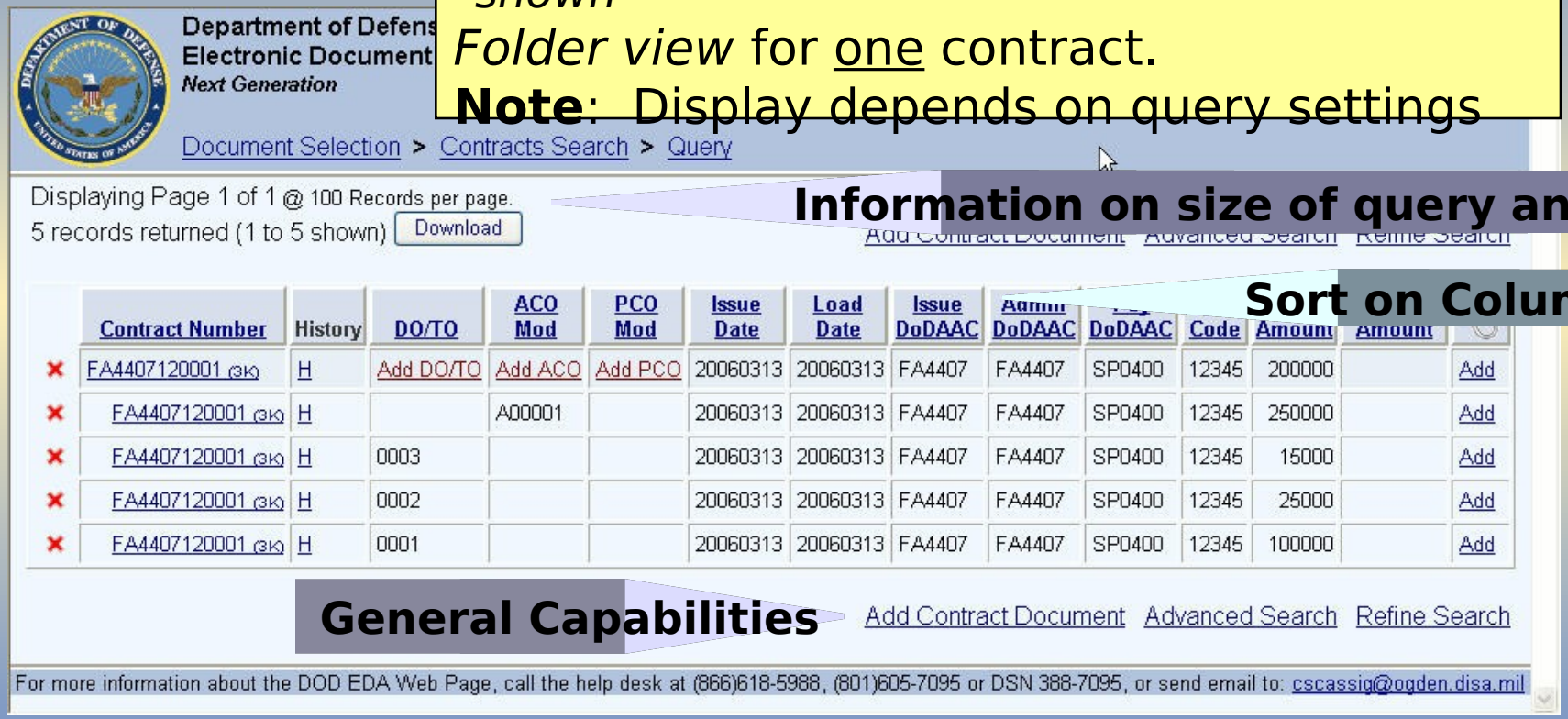
Custom – Advanced Search

Contract Query Result Set

Contact Query Result Page…*Sample shown*

Folder view for <u>one</u> contract.

Note: Display depends on query settings



Interface options and their behavior in Option 2…

Interface Options on Result Page

Users with the Upload Role & Issue DoDAAC(s) ***listed*** on their user account have additional interface options within Contract search result pages

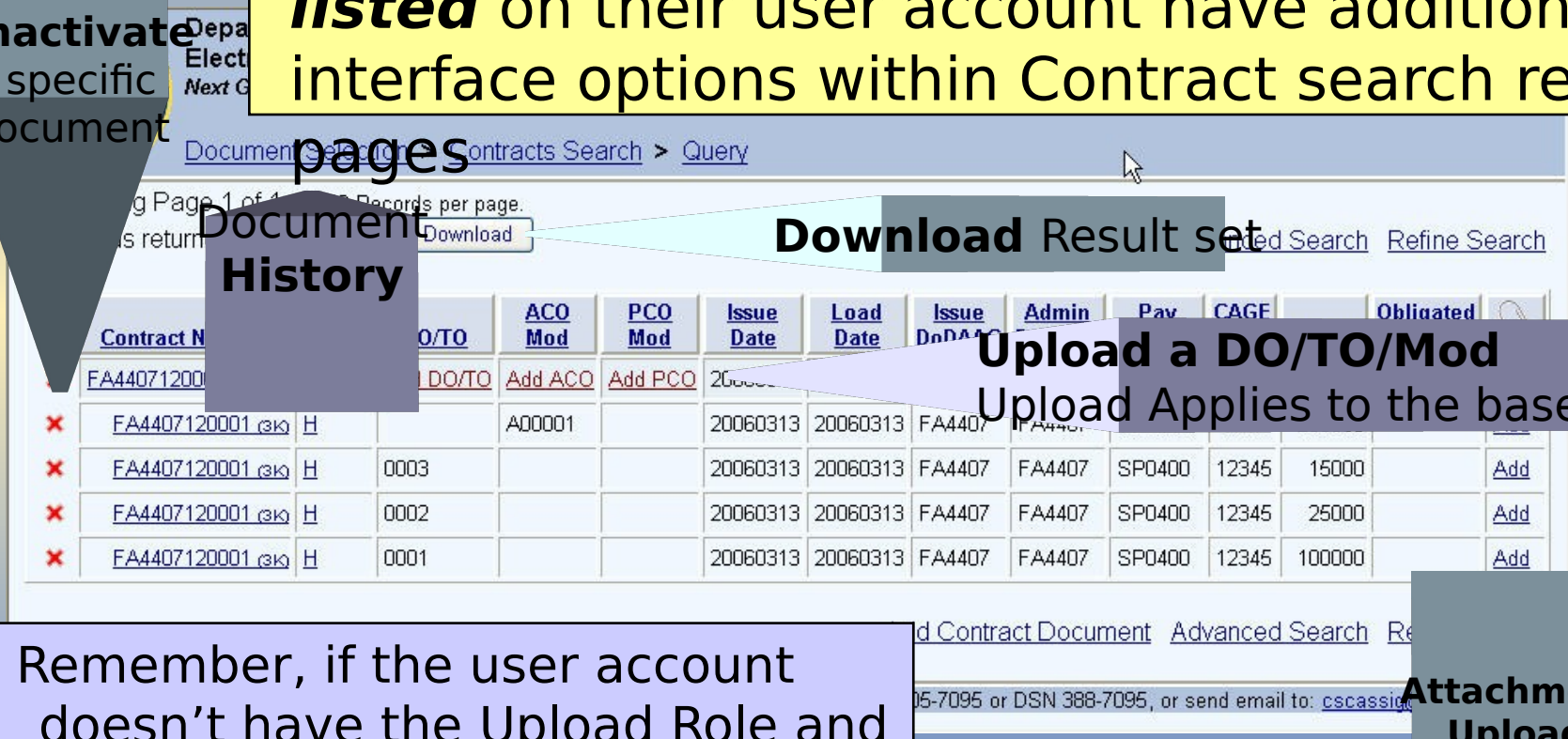
Inactivate a specific document

Document History

Download Result set

Upload a DO/TO/Mod
Upload Applies to the base contra

Attachment Upload Role

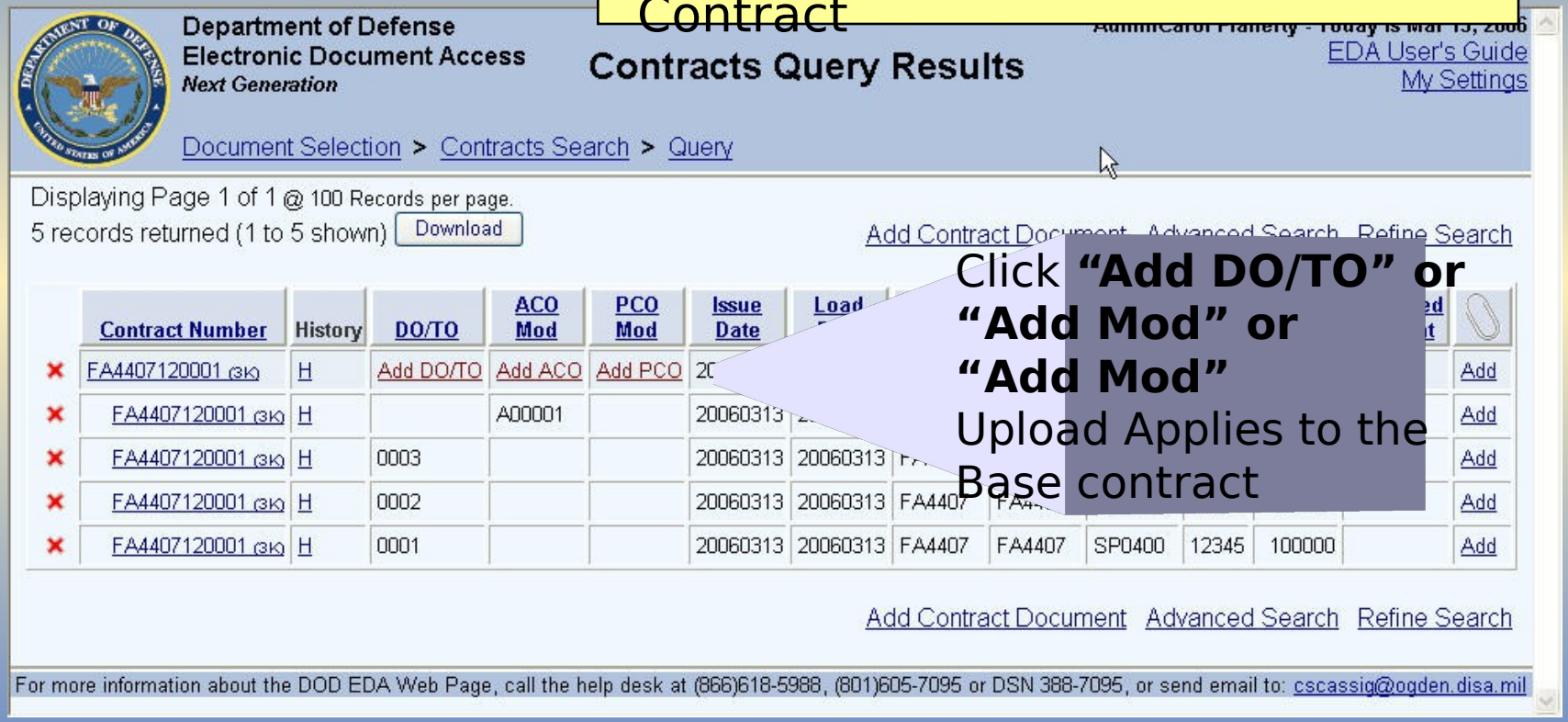


Remember, if the user account doesn't have the Upload Role and particular DoDAAC in query result, the user will NOT see options for uploading and/or inactivating documents

To Upload a Mod/DO/TO…

Upload a Mod/DO/TO

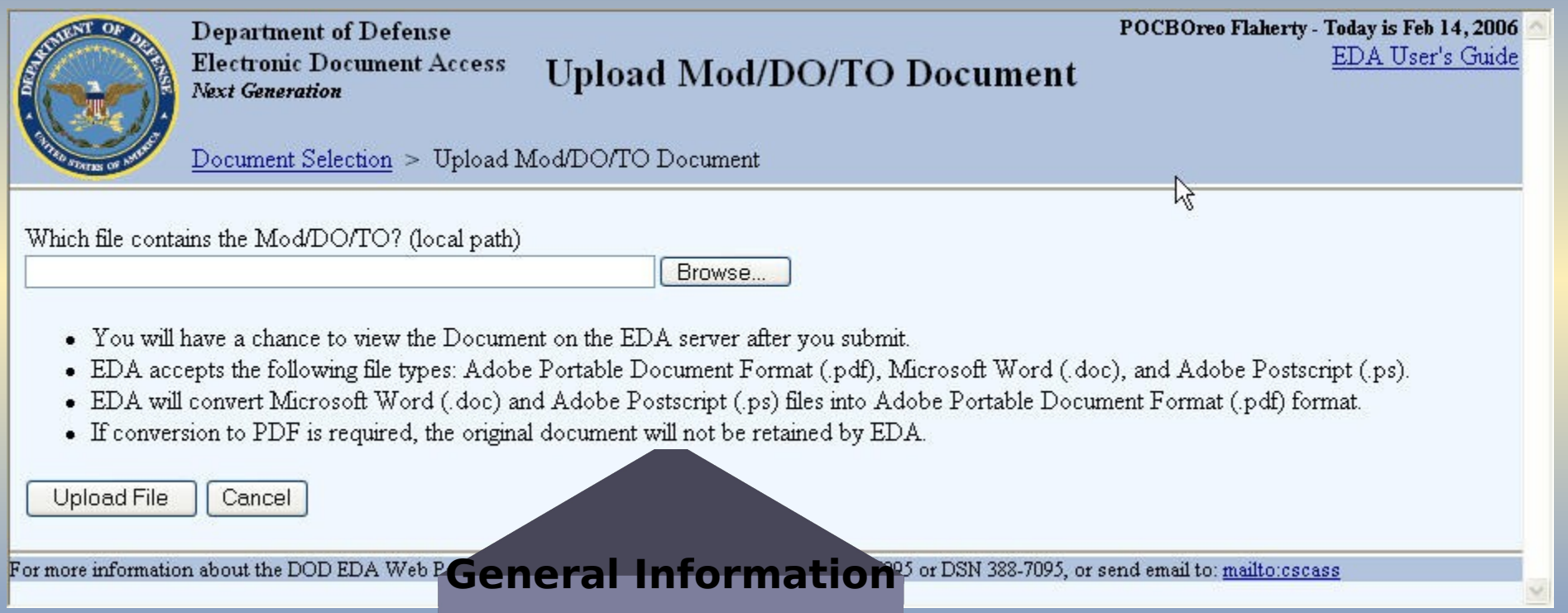
Upload Modification/DO/TO is the same process as Upload Base Contract



Click **“Add DO/TO” or “Add Mod” or “Add Mod”**
Upload Applies to the Base contract

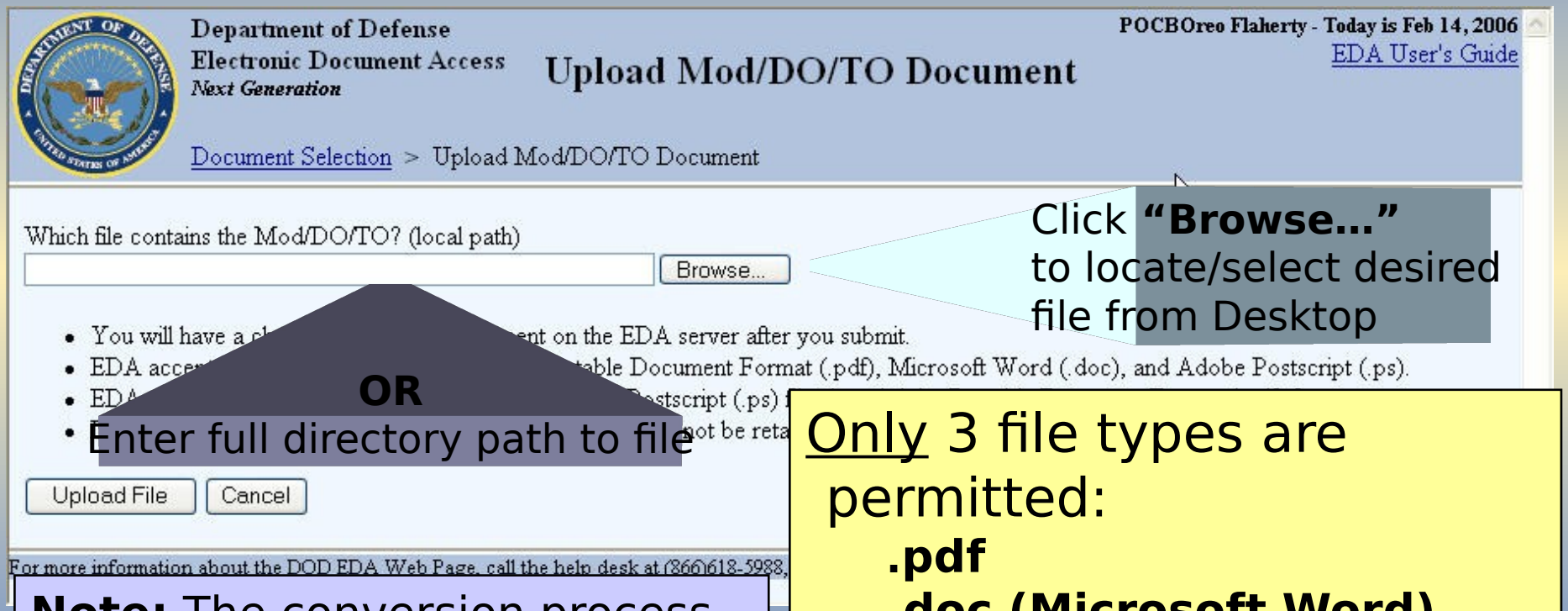
Upload a Modification to a contract…

Begin the Mod/DO/TO Upload



Locate desired document for upload…

Mechanics of Upload



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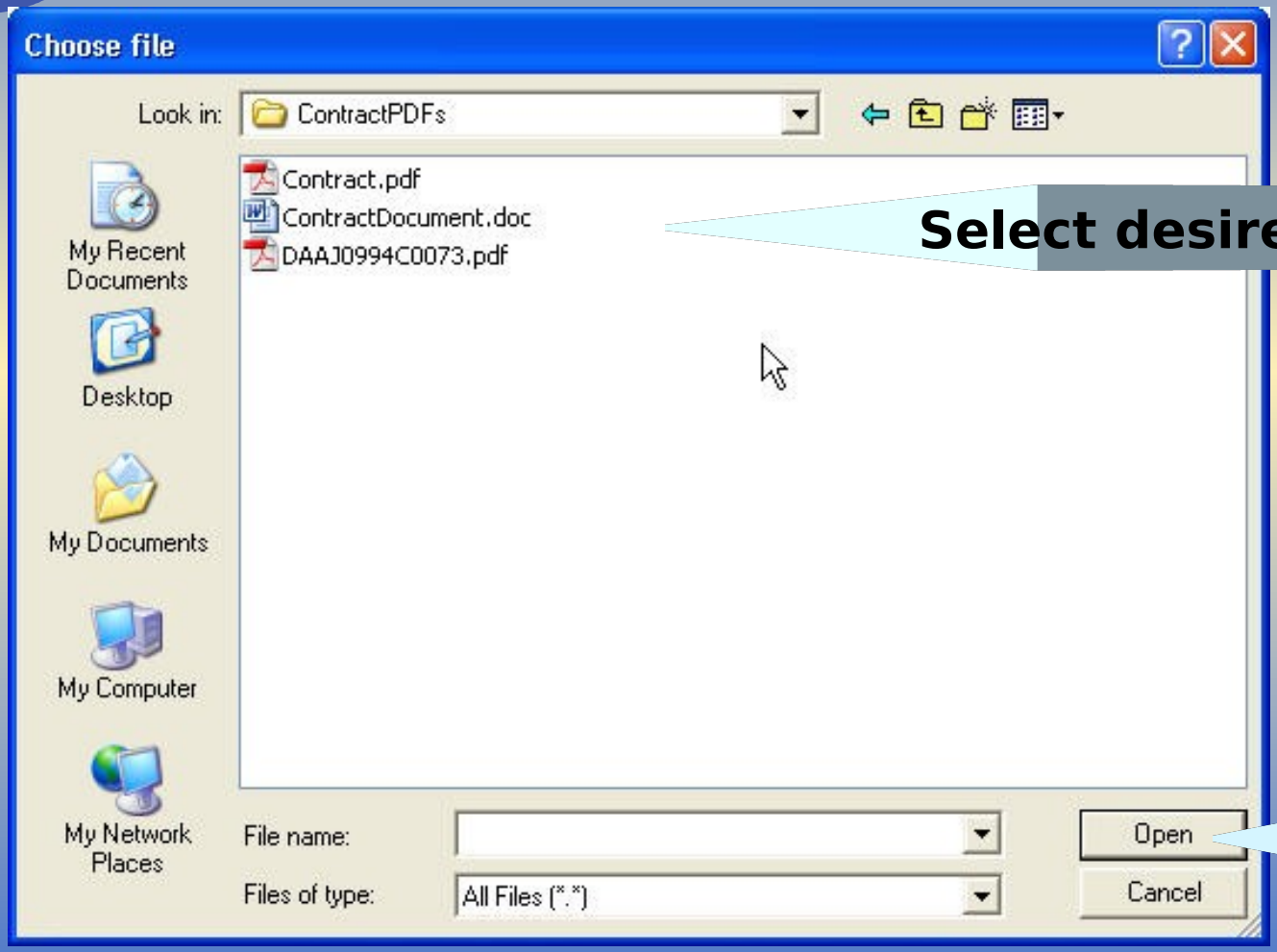
Only 3 file types are permitted:

- **.pdf**
- **.doc (Microsoft Word)**
- **.ps (Adobe postscript)**

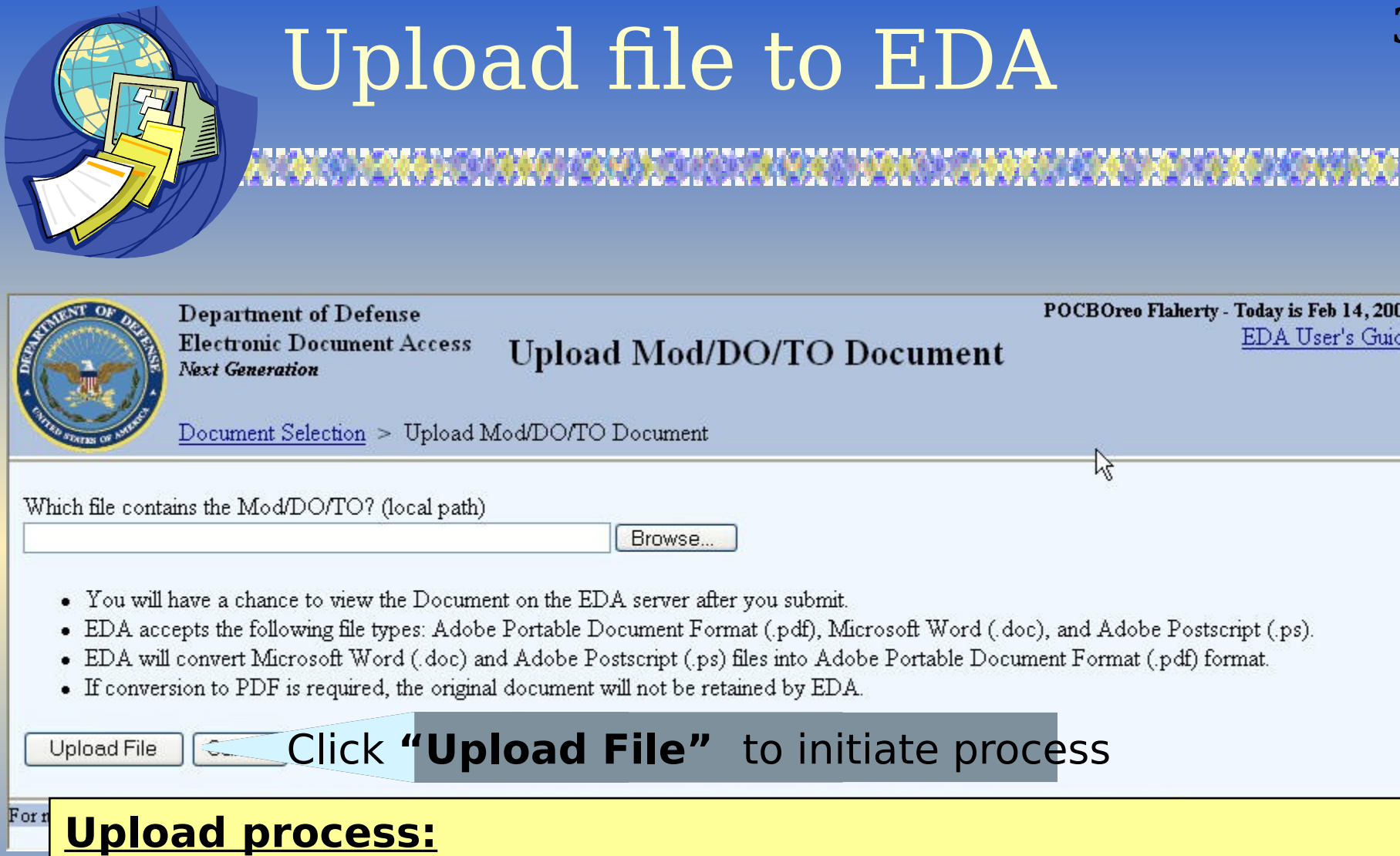
EDA will convert .doc & .ps to .pdf

EDA presents an error message

Browse/Select file to be uploaded



Upload file to EDA



Upload process:

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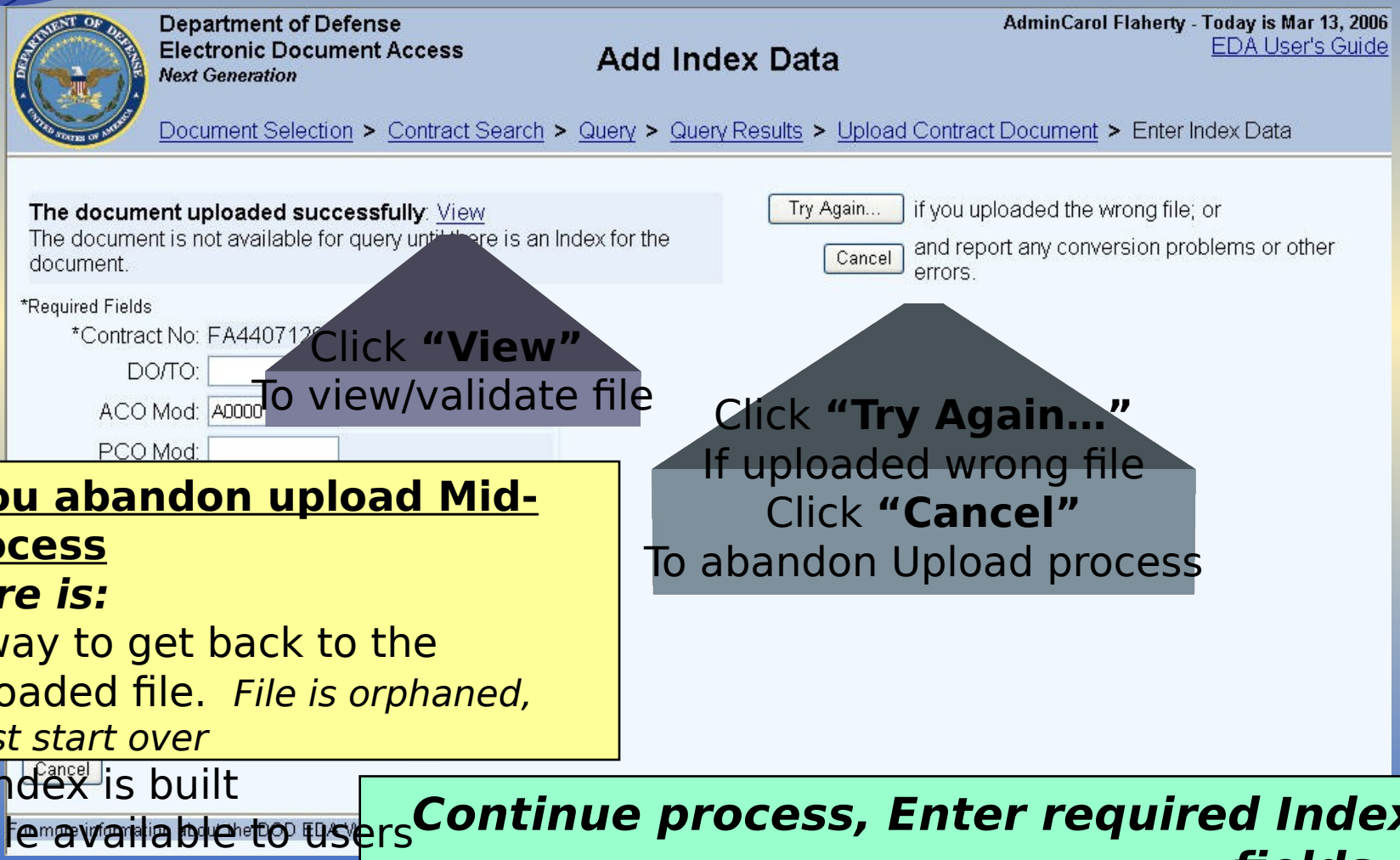
After successful conversion, the .pdf is stored on EDA's

Preview Document & Build Index



Click **"View"**
To view/validate file

Click **"Try Again…"**
If uploaded wrong file
Click **"Cancel"**
To abandon Upload process

<u>If you abandon upload Mid-process</u>

There is:

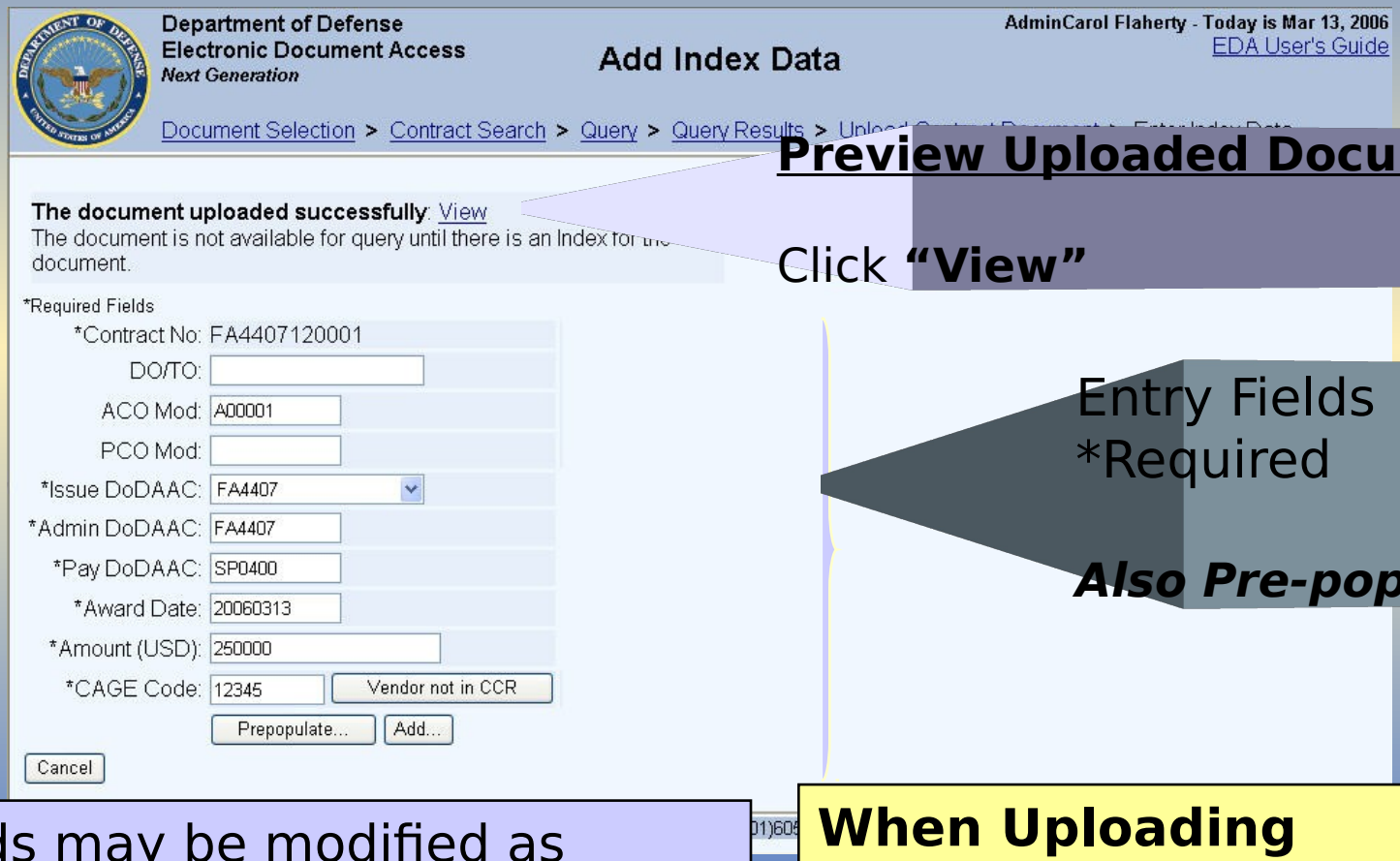
No way to get back to the uploaded file. *File is orphaned, must start over*

No Index is built

No file available to users

Continue process, Enter required Index fields…

Preview Document & Build Index



Preview Uploaded Document

Click **"View"**

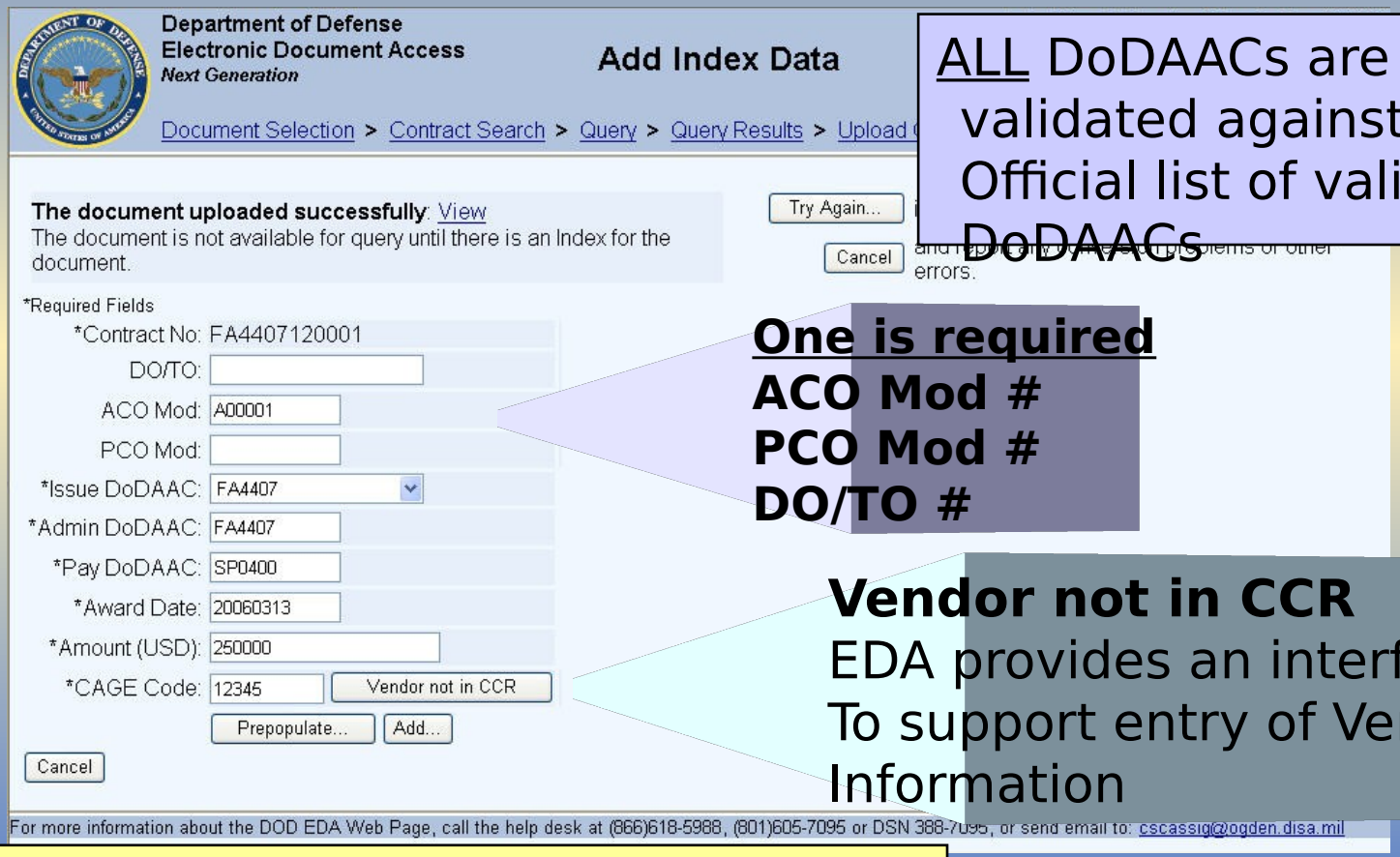
Entry Fields
*Required

Also Pre-populated

Fields may be modified as required.
Contract # cannot be changed.

When Uploading Mod/DO/TOs….
EDA pulls from the base contract index and pre-fills

Preview Document & Build Index



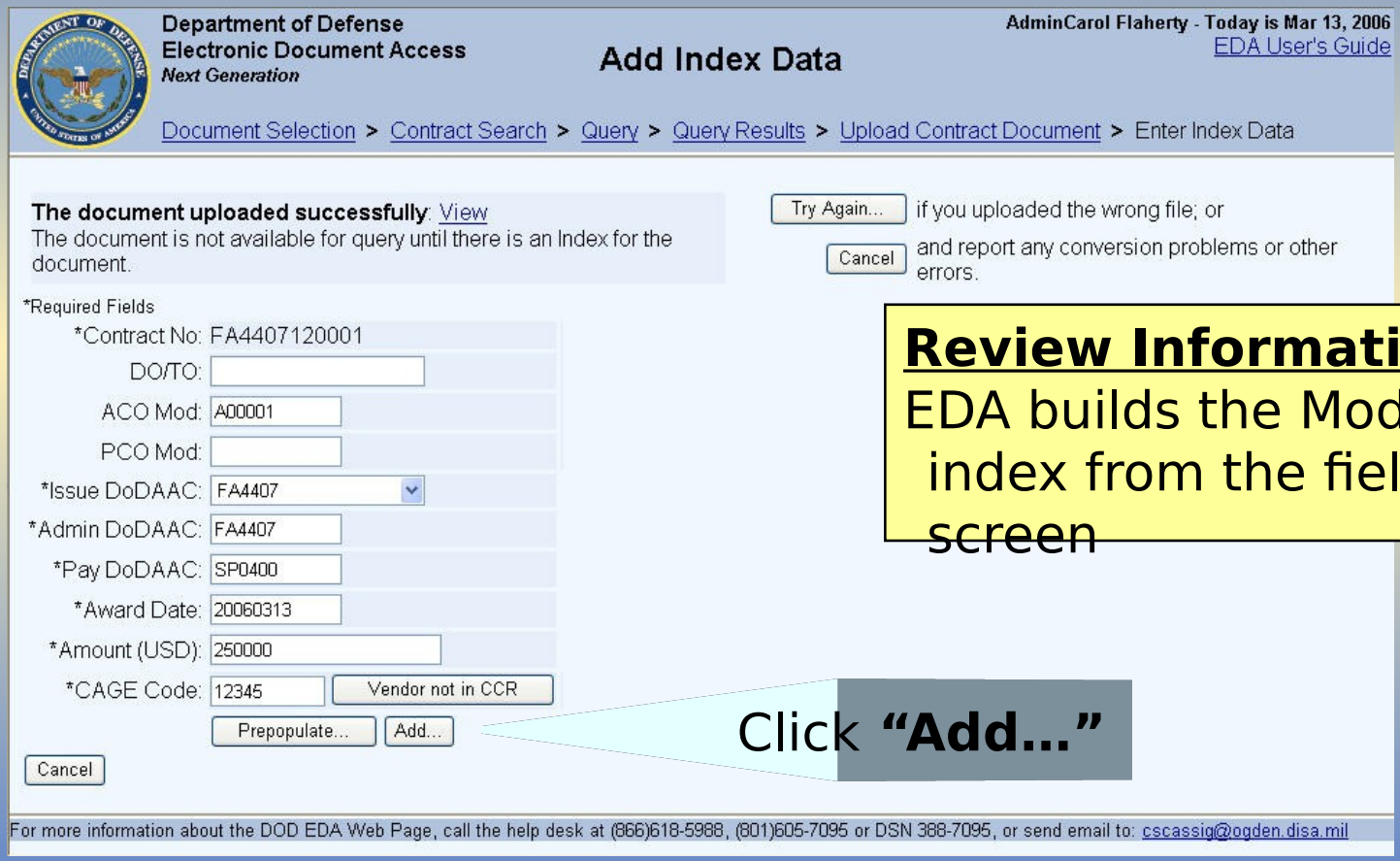
ALL DoDAACs are validated against DoDs Official list of valid DoDAACs

One is required
ACO Mod #
PCO Mod #
DO/TO #

Vendor not in CCR
EDA provides an interface To support entry of Vendor Information

Company Awarded - pulled directly from CCR based on CAGE Code entered.

Enter Index Fields & Review

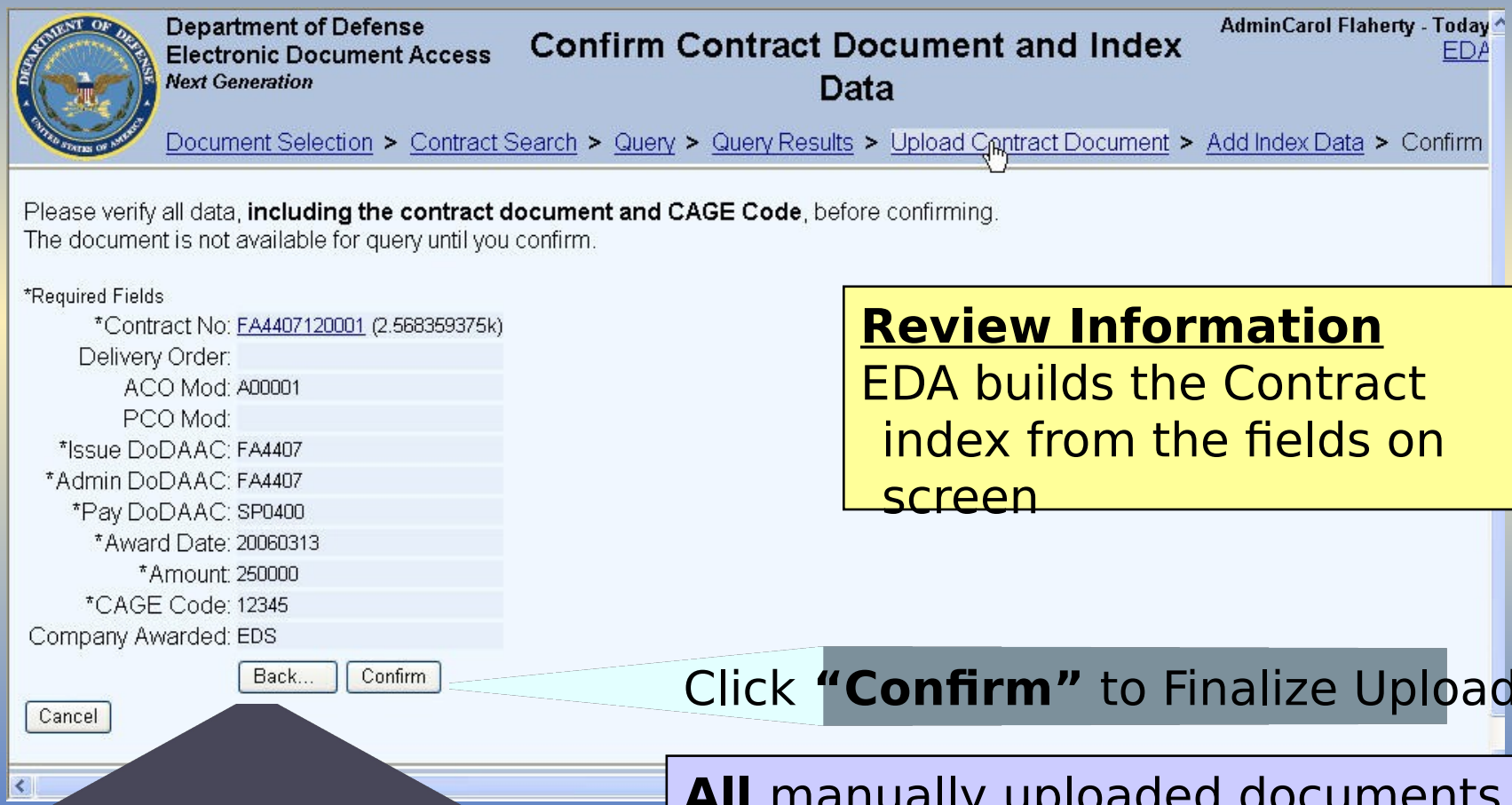


Review Information

EDA builds the Mod/DO/TO index from the fields on screen

Click **"Add..."**

Upload Confirmation



Review Information
EDA builds the Contract index from the fields on screen

Click **"Confirm"** to Finalize Upload

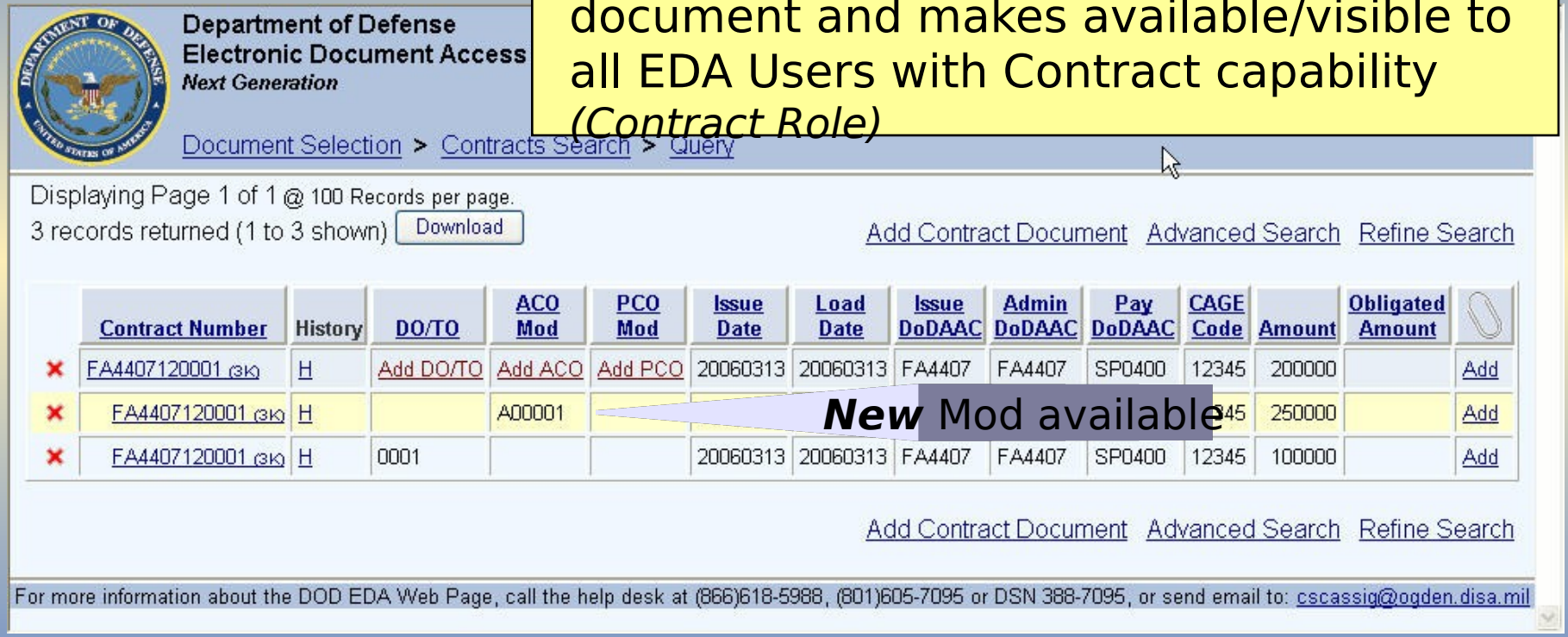
Click **"Back..."** to update/fix any information

All manually uploaded documents are included in existing EDA 'load' broadcast reports based on Load

After Mod/DO/TO Upload

Contact Query Result Page

EDA builds the index, stores the .PDF document and makes available/visible to all EDA Users with Contract capability *(Contract Role)*



Next, Let's inactivate a Document…

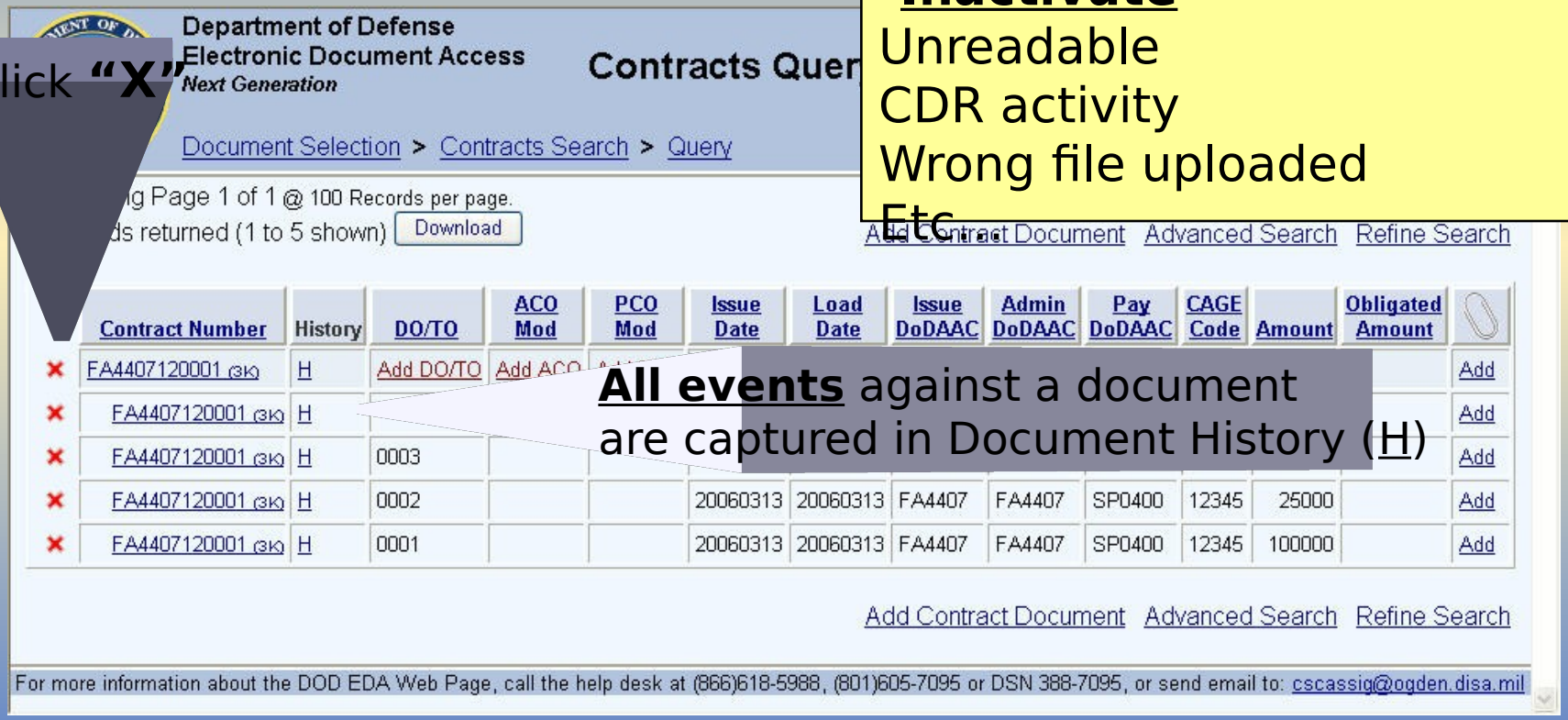
…Then replace it

Inactivate a Document

Possible Reasons to Inactivate

Unreadable
CDR activity
Wrong file uploaded
Etc.

Click **"X"**

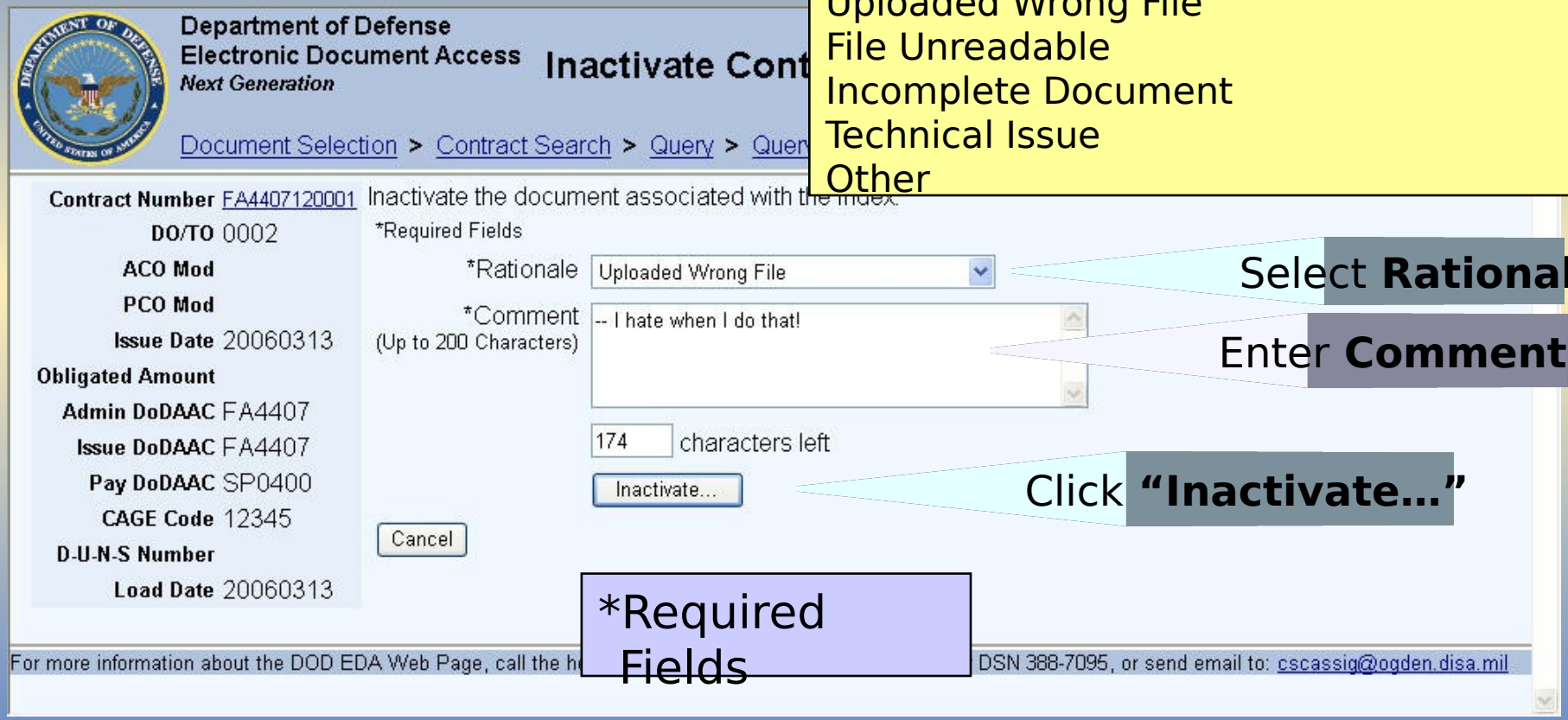


All events against a document are captured in Document History (H)

Inactivate a Document…

Rationale & Comment to Inactivate

Why are you Inactivating the Document?
Uploaded Wrong File
File Unreadable
Incomplete Document
Technical Issue
Other



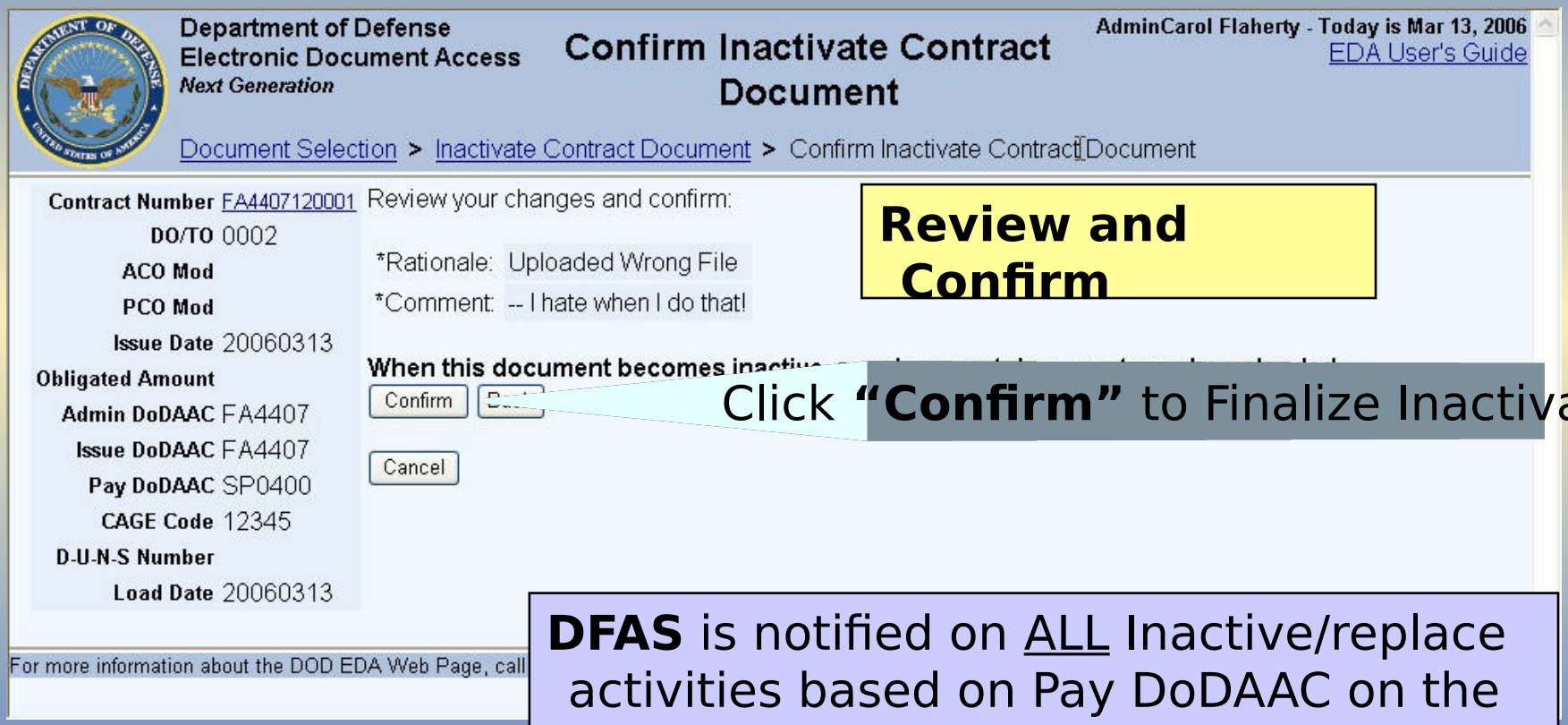
Select **Rationale**

Enter **Comment**

Click **“Inactivate…”**

*Required Fields

Confirm Inactivation



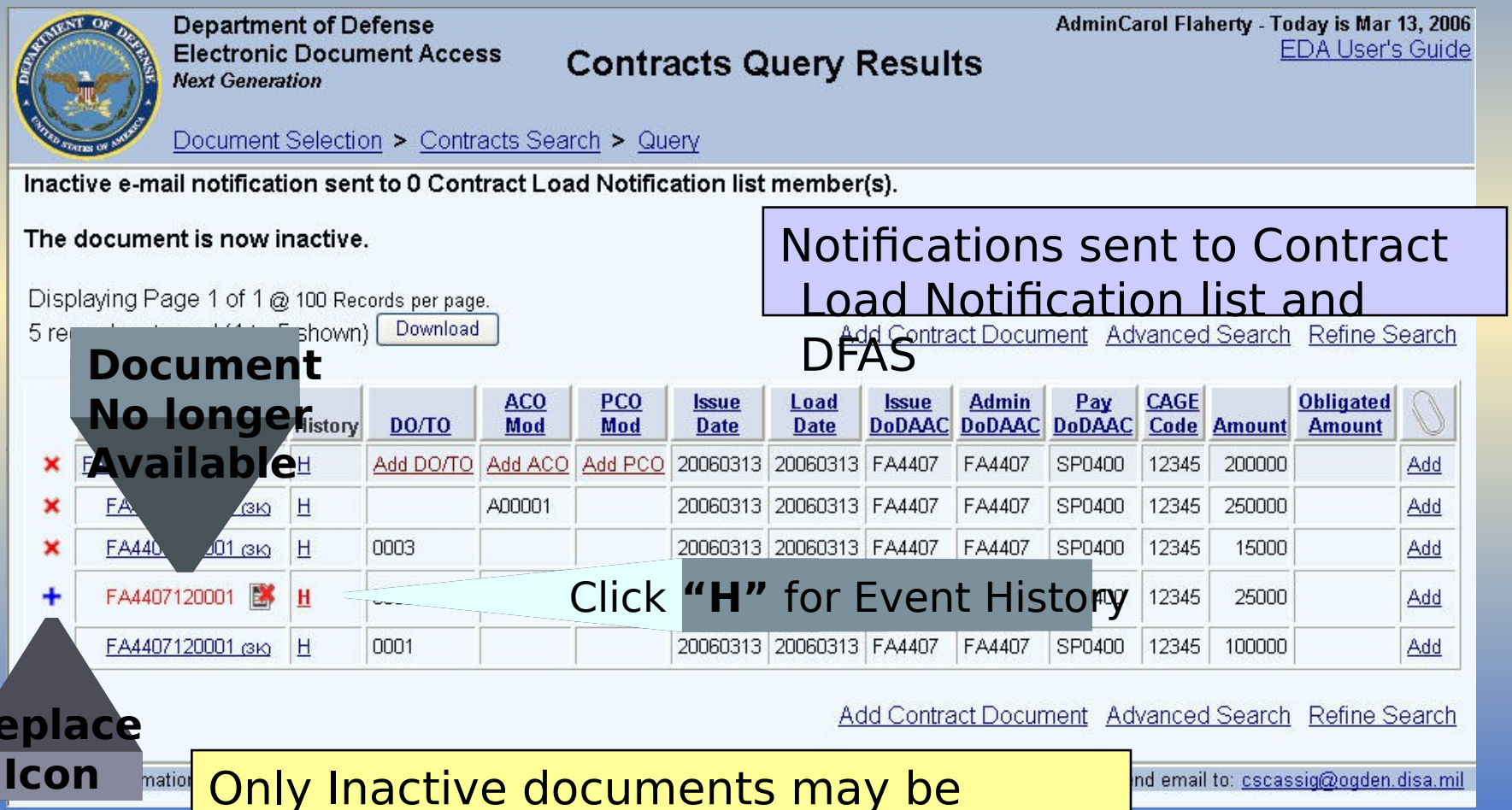
Review and Confirm

Click **"Confirm"** to Finalize Inactivat

DFAS is notified on ALL Inactive/replace activities based on Pay DoDAAC on the index

If Contract Load Notification list *exists* all participants are notified on inactive and/or replace activities.

After Inactivation…Result Page



Inactivation Notification

You replied on 3/10/2006 12:07 PM.

From: steven.p.jones@eds.com Sent: Fri 3/10/2006 6:02 AM

To: Flaherty, Carol J

Cc:

Subject: EDA Contract document inactivated FA4407000001--CJF

This message was automatically generated. Please do not respond to this message.

An EDA user has inactivated the contract document for the following contract:

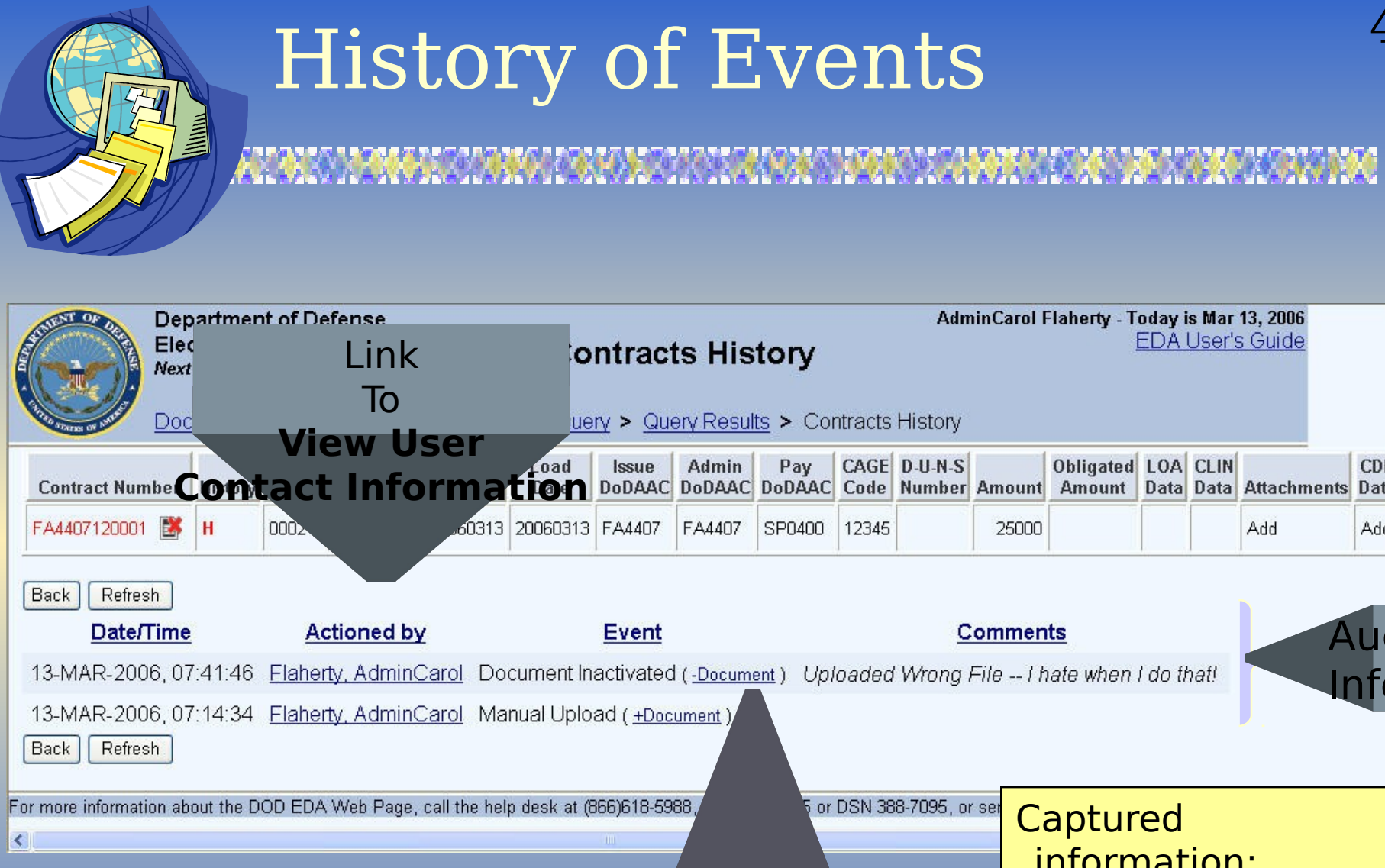
Contract: FA4407000001
DO/TO:
ACO Mod: CJF
PCO Mod:
Rationale: Uploaded Wrong File

Informational Inactivation Details

This contract is no longer available in EDA. Authorized EDA users may upload a replacement document. When this occurs, you will receive an e-mail notification.

If you have any questions regarding EDA, please contact the EDA Help Desk at: (866)618-5988, (801)605-7095 or DSN: 388-7095, or with email at: cscassig@ogden.disa.mil(Subject: EDA Assistance).

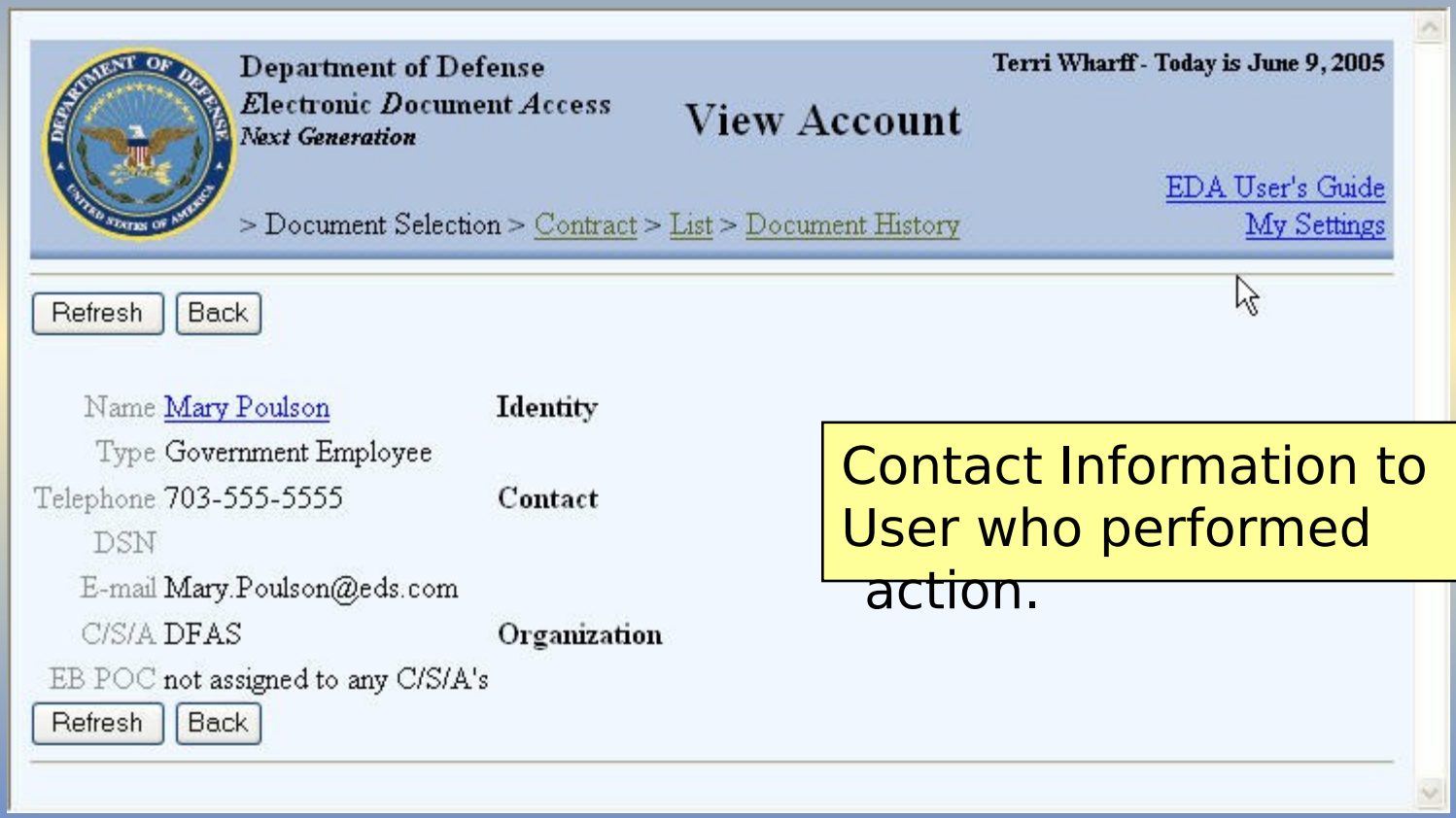
History of Events



Captured information:

Date
Time
Action by
Event
Notes/Comments

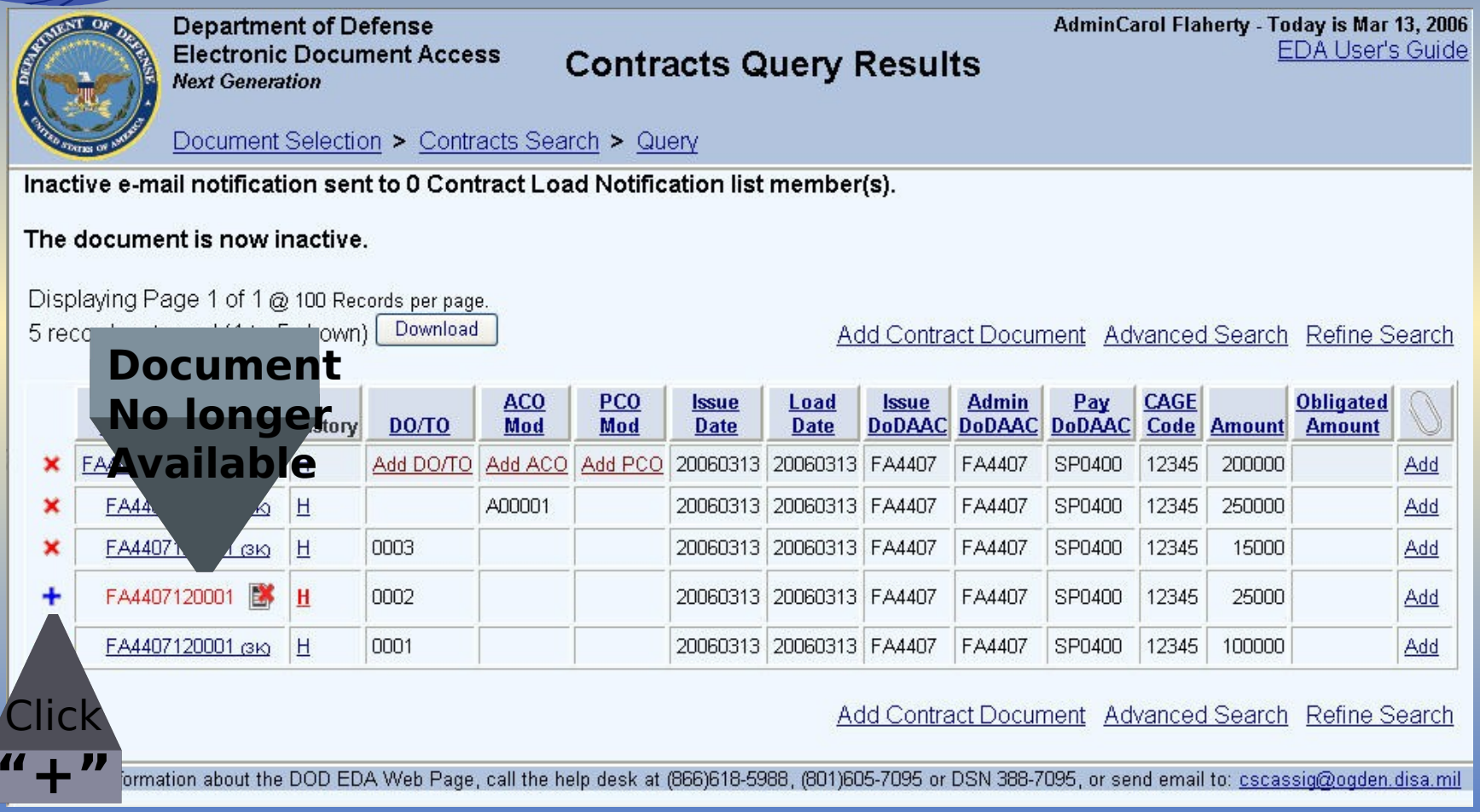
View Contact Information



Contact Information to User who performed action.

Let's Replace the document…

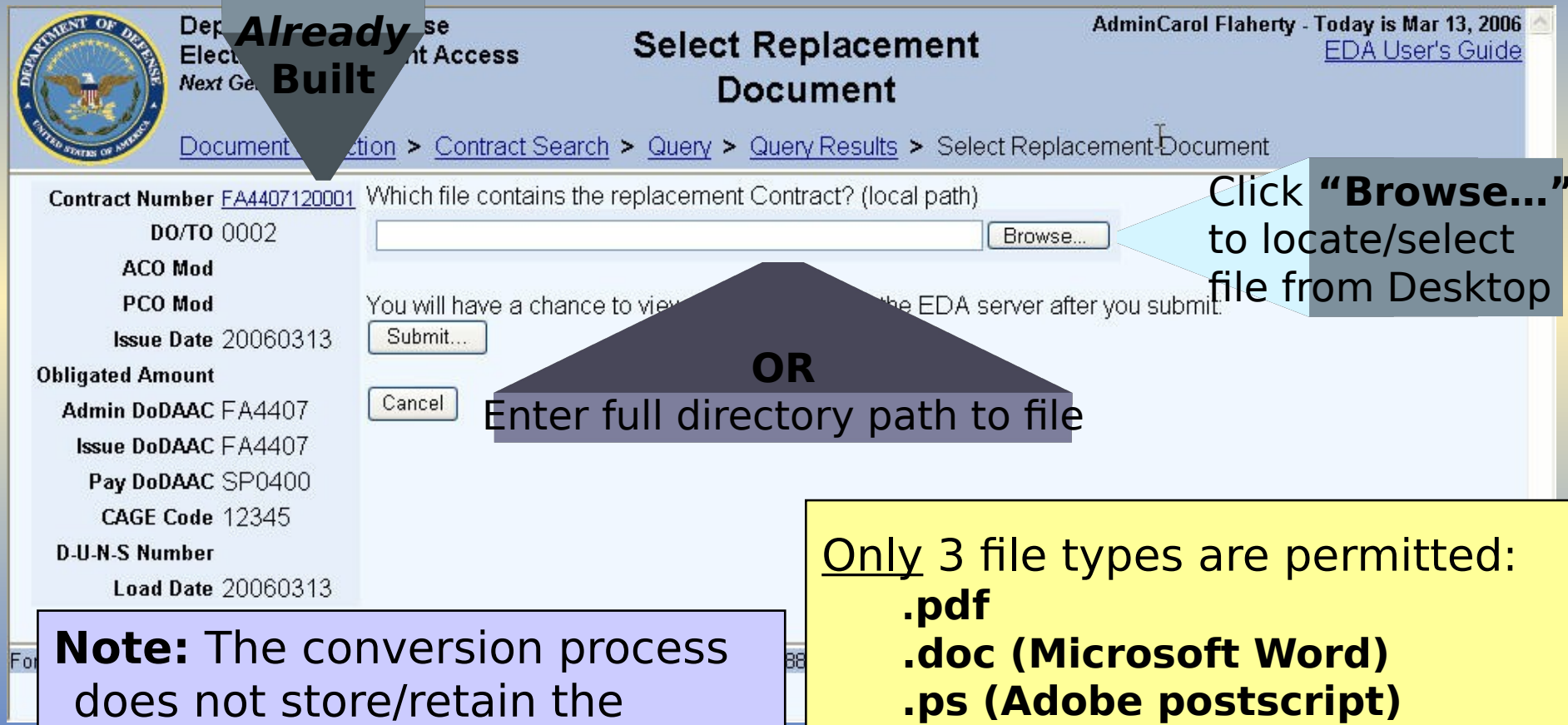
Replace Document



	DO/TO	ACO Mod	PCO Mod	Issue Date	Load Date	Issue DoDAAC	Admin DoDAAC	Pay DoDAAC	CAGE Code	Amount	Obligated Amount	
✖	Add DO/TO	Add ACO	Add PCO	20060313	20060313	FA4407	FA4407	SP0400	12345	200000		Add
✖	H	A00001		20060313	20060313	FA4407	FA4407	SP0400	12345	250000		Add
✖	H	0003		20060313	20060313	FA4407	FA4407	SP0400	12345	15000		Add
+	H	0002		20060313	20060313	FA4407	FA4407	SP0400	12345	25000		Add
	H	0001		20060313	20060313	FA4407	FA4407	SP0400	12345	100000		Add

Replace Document

Index *Already* Built



Click **"Browse…"** to locate/select file from Desktop

OR

Enter full directory path to file

Note: The conversion process does not store/retain the original form of the document. Conversion is accomplished in "near real-time".

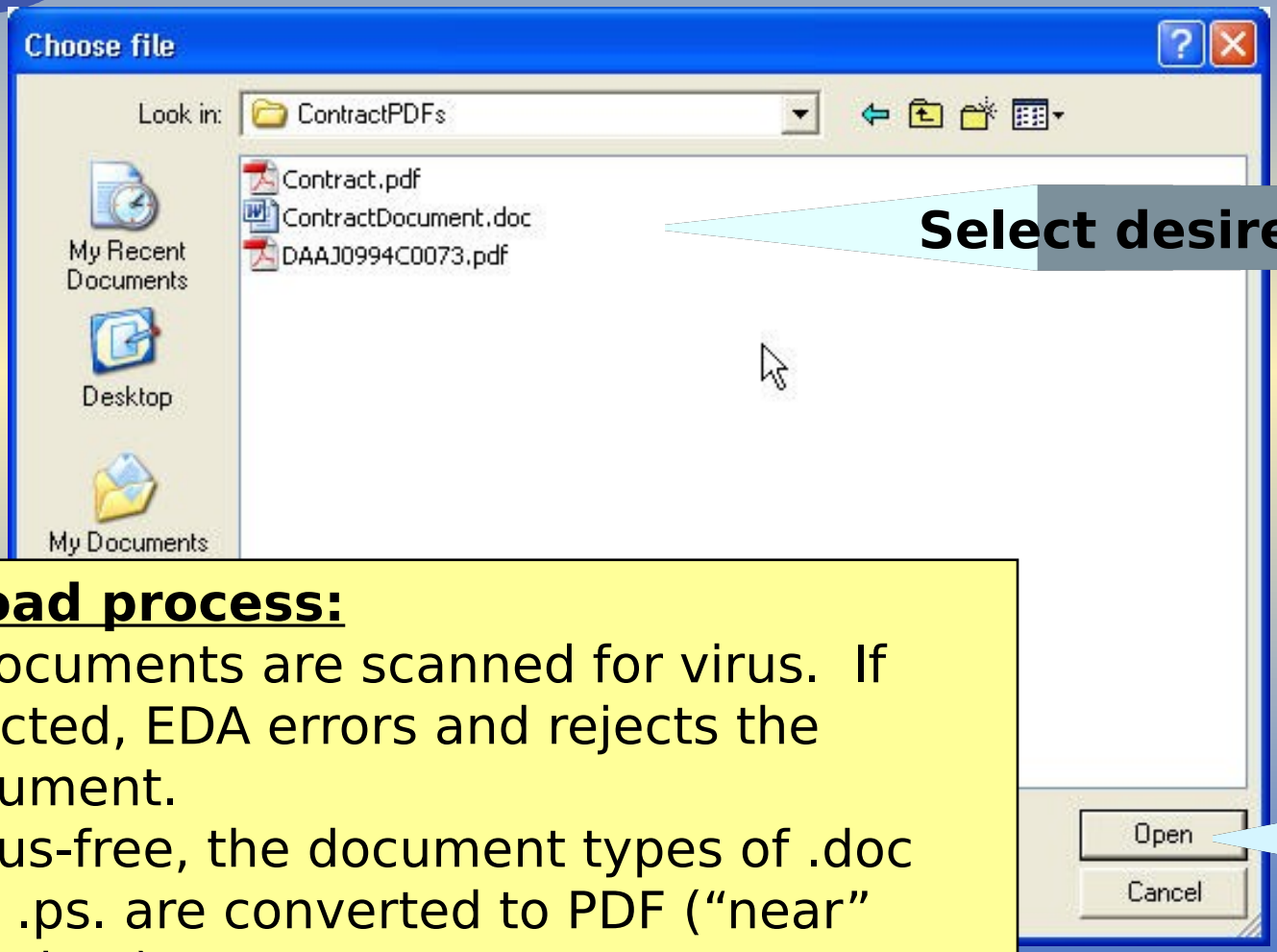
Only 3 file types are permitted:

- **.pdf**
- **.doc (Microsoft Word)**
- **.ps (Adobe postscript)**

EDA will convert .doc & .ps to .pdf

EDA presents an error message for invalid file types during upload

Browse/Select file to be uploaded



Select desired file

Click **"Open"**

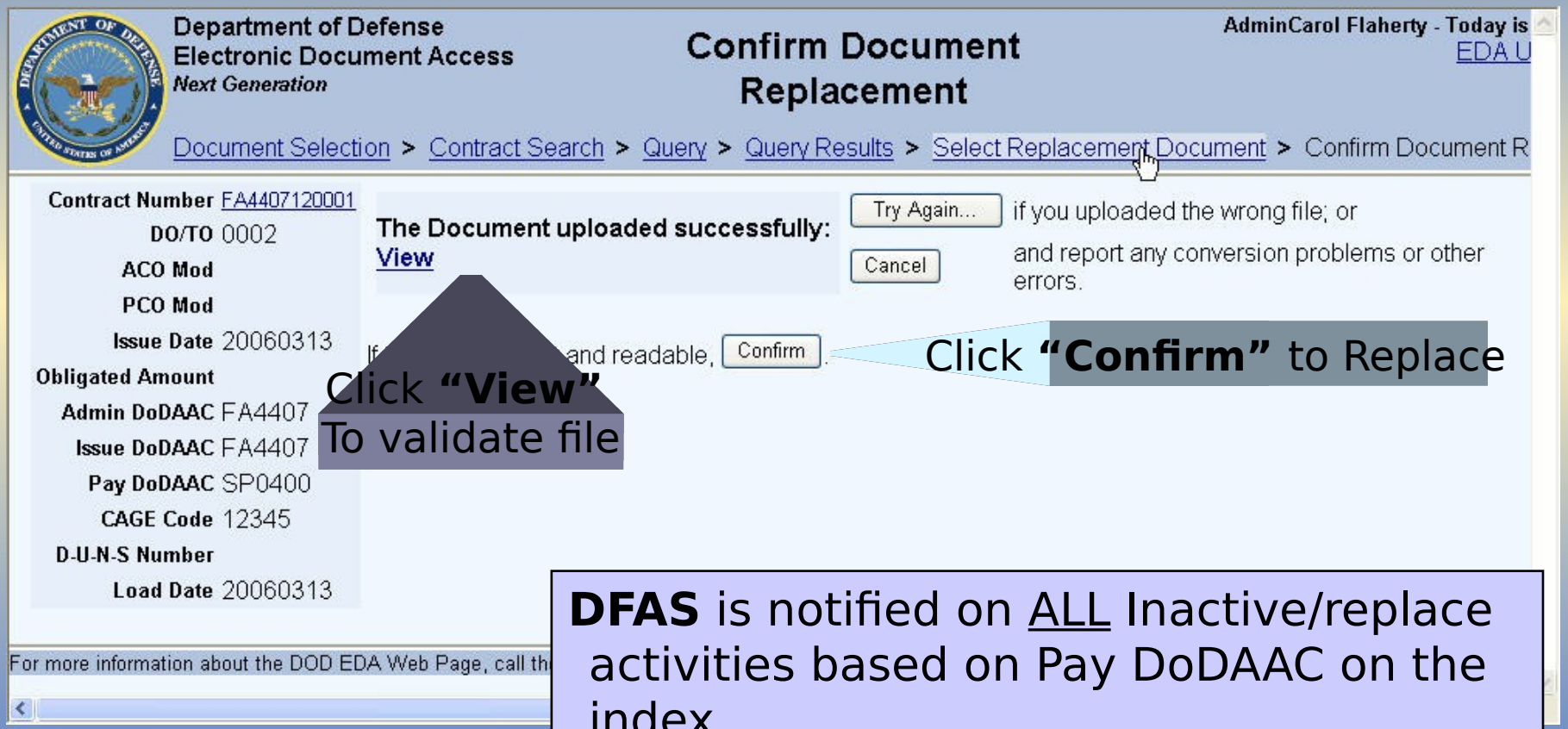
Upload process:

All documents are scanned for virus. If infected, EDA errors and rejects the document.

If virus-free, the document types of .doc and .ps. are converted to PDF ("near" real-time).

After successful conversion, the .pdf is

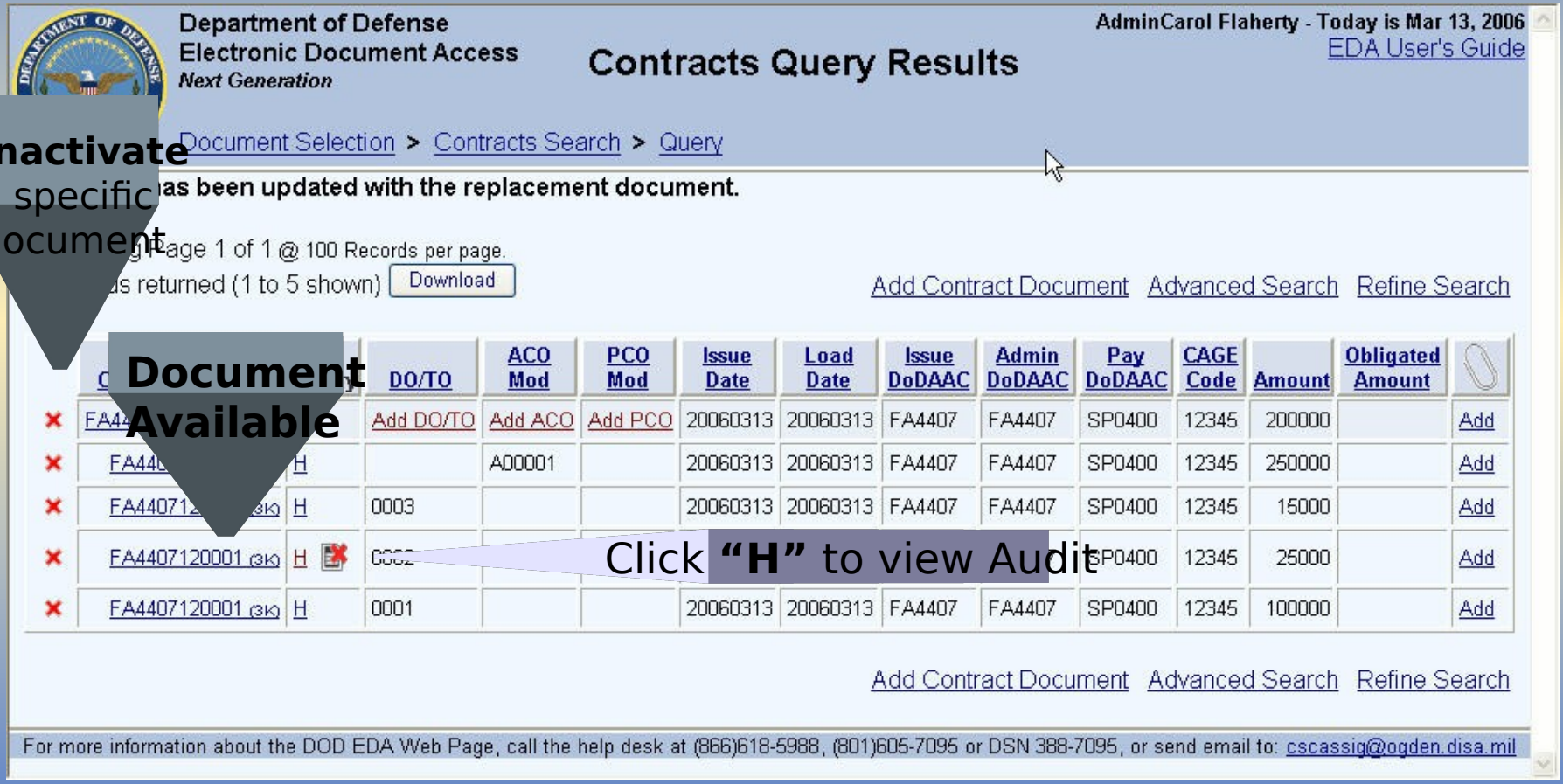
Confirm Replacement Document



DFAS is notified on ALL Inactive/replace activities based on Pay DoDAAC on the index

If Contract Load Notification list *exists* all participants are notified on inactive and/or replace activities.

After Replacement…Result Page



Inactivate a specific document

Document Available

Click **"H"** to view Audit

View History after Replace

Department of Defense
Electronic Document Access
Next Generation

Contracts History

AdminCarol Flaherty - Today is Mar 13, 2006
EDA User's Guide

Document Selection > Contract Search > Query > Query Results > Contracts History

Contract Number	History	DO/TO	ACO Mod	PCO Mod	Issue Date	Load Date	Issue DoDAAC	Admin DoDAAC	Pay DoDAAC	CAGE Code	D-U-N-S Number	Amount	Obligated Amount	LOA Data	CLIN Data	Attachments	CDR Data
FA4407120001 (3K)	H	0002			20060313	20060313	FA4407	FA4407	SP0400	12345		25000				Add	Add

Back Refresh

Date/Time	Actioned by	Event	Comments
13-MAR-2006, 07:48:42	Flaherty, AdminCarol	Document Replaced (+Document)	
13-MAR-2006, 07:41:46	Flaherty, AdminCarol	Document Inactivated (-Document)	*Uploaded Wrong File -- I hate when I do that!*
13-MAR-2006, 07:14:34	Flaherty, AdminCarol	Manual Upload (+Document)	

Back Refresh

For more information about the DOD EDA Web Page, call the help desk [illegible]88, (801)605-7095 or DSN 388-7095, or send email to: cscassig@ogden.disa.mil

Audit Info

Links To **"Previous"** Documents

An expanded "Event" History…

View History – repeating process

Department of Defense
Electronic Document Access
Next Generation

Contracts History

AdminCarol Flaherty - Today is Mar 13, 2006
EDA User's Guide

Document Selection > Contract Search > Query > Query Results > Contracts History

Contract Number	History	DO/TO	ACO Mod	PCO Mod	Issue Date	Load Date	Issue DoDAAC	Admin DoDAAC	Pay DoDAAC	CAGE Code	D-U-N-S Number	Amount	Obligated Amount	LOA Data	CLIN Data	Attachments	CDR Data
FA4407120001 (3K)	H	0002			20060313	20060313	FA4407	FA4407	SP0400	12345		25000				Add	Add

Back Refresh

Date/Time	Actioned by	Event	Comments
13-MAR-2006, 07:51:19	Flaherty, AdminCarol	Document Replaced (+Document)	
13-MAR-2006, 07:51:01	Flaherty, AdminCarol	Document Inactivated (-Document)	*Uploaded Wrong File -- I can't believe I did it AGAIN! I'll try again.*
13-MAR-2006, 07:48:42	Flaherty, AdminCarol	Document Replaced (+Document)	
13-MAR-2006, 07:41:46	Flaherty, AdminCarol	Document Inactivated (-Document)	*Uploaded Wrong File -- I hate when I do that!*
13-MAR-2006, 07:14:34	Flaherty, AdminCarol	Manual Upload (+Document)	

Back Refresh

For more information about the DOD EDA Web Page, call the help desk at (866)[illegible]21)605-7095 or DSN 388-7095, or send email to: cscassig@ogden.disa.mil

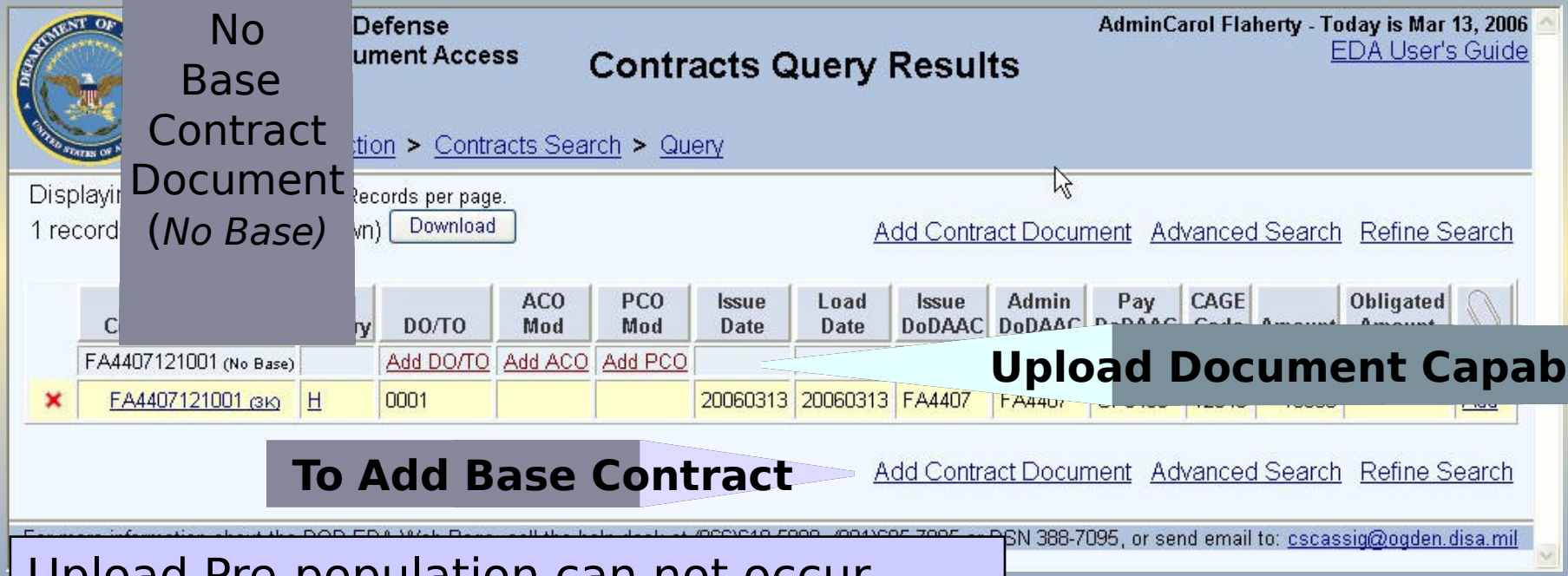
Audit Info

Links To **"Previous"** Documents

No Base Contract Document…

Base Contract not Required

No Base Contract Document (*No Base*)



Upload Pre-population can not occur when a Base Contract doesn't exist (No Base)

Now let's Look at complexity in the Query…

Upload Option Summary

Remember, there are multiple ways to accomplish a manual document upload...

Sample Contract Load Notifcation

EDA User Contract Load Notification

From: steven.p.jones@eds.com Sent: Mon 3/13/2006 4:41 AM
To: Flaherty, Carol J
Cc:
Subject: EDA New Contract Document(s) Posted

The following contract document(s) posted on: 03/10/2006

Contract	Del Order	ACO Mod	PCO Mod	CAGE	D-U-N-S
FA4407000001	CAROL				

https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new_app.Get_Doc?ptable_id=2&precord_key='0EA5EF5BB4C03C2FE04408000955CA14'&pMultipart_ID=

FA4407000001 CJF 12345
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new_app.Get_Doc?ptable_id=2&precord_key='0EA5F8E51CC03C27E04408000955CA14'&pMultipart_ID=

FA4407000001 OREO 12345
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new_app.Get_Doc?ptable_id=2&precord_key='0EA5EF5BB4C43C2FE04408000955CA14'&pMultipart_ID=

FA4407000001 ROXY 12345
https://ushrsebs003.vahrn.us.eds.com:1643/pls/user/new_app.Get_Doc?ptable_id=2&precord_key='0EA5F8E51CC23C27E04408000955CA14'&pMultipart_ID=

This message was automatically generated o
carol.flaherty@eds.com

Links to new documents

EDA Users receive notification with embedded links to the newly uploaded documents.

Sample Contract Load Notifcation

Non-EDA User Contract Load Notification

The following contract document(s) posted on: 03/10/2006

Contract	Del Order	ACO Mod	PCO Mod	CAGE	D-U-N-S
FA4407000001	CAROL				
FA4407000001		CJF		12345	
FA4407000001		OREO		12345	
FA4407000001			ROXY	12345	

This message was automatically generated on behalf of:
carol.flaherty@eds.com

PLEASE DO NOT RESPOND to this message.

Non-EDA Users receive an informational e-mail on Contract Load Notification.

Contract Load Notification

Recommend Viewing/Reading…

Contract Load Notification Training Module

EDA User's Guide

Refer to the EDA Users Guide

- STEP-by-STEP instructions (for all Capabilities)
- Training Modules
- Entire section dedicated to the EDA Executive and the EDA POC and their tasks/activities